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SOCIAL SCIENTIFIC ISSUES IN SOCIAL GERONTOLOGICAL THEORY, RESEARCH AND POLICY: AN ANTHROPOLOGICAL CRITIQUE

by

GAYLAJUNE VANDERKLEY

A THESIS

SUBMITTED TO THE FACULTY OF GRADUATE STUDIES AND RESEARCH

IN PARTIAL FULFILLMENT OF THE REQUIREMENTS FOR THE DEGREE OF

MASTER OF ARTS

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EDMONTON, ALBERTA

SPRING 1986

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The undersigned certify that they have read, and recommend to the Faculty of Graduate Studies and Research, for acceptance, a thesis entitled Social Scientific Issues in Social Gerontological Theory, Research, and Policy: An Anthropological Critique submitted by GaylaJune VanderKley in partial fulfullment of the requirements for the degree of Master of Arts.

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Date February 26 1986

ABSTRACT

Social gerontology is a relatively new field of study and since all of the social scientific disciplines contribute research findings, offer social commentary, and suggest possible solutions to both practical and scientific problems, the field is extremely complex. All social scientific disciplines stem from various philosophical roots but each has developed its own focuses, ideological stances, and empirical methodologies. All of them study the same phenomena, however, and because they constantly affect each other, controversy within and across disciplines is a distinct characteristic of social scientific studies.

The nature and development of social scientific theory has to be explored before the theoretical problems of social gerontology can be appreciated. These theoretical problems underlie the difficulties inherent in research and policy formation. The kinds of research that can be carried out and the policies that are based on research results are not solely determined by social scientists because there is a practical aspect to social gerontology that is highly influenced by political and economic concerns. This complicates the study of age and aging, but it must be acknowledged in any consideration of the academic difficulties in social gerontology because it impinges upon almost everything that is done in the field. The present work examines the nature of social scientific theory and its influence on the development of social gerontology. Problems with social gerontological theory and their implications for research and policy formation are then discussed against this background.

Social scientists are consistently made aware of the complexity of human life and of the fallacy of citing simplistic theories to arrive at solutions to both scientific and practical problems. Many social scientists believe that the goal of their discipline is to arrive at a unified and universal theory of human behavior. But because it is impossible to discuss human life without resorting to philosophical arguements, social scientists are never able to be purely objective and empirical. Each of the disciplines is constantly involved in attempting to perfect its methods and its analyses of data, and each has a unique kind of influence on each of the others. Because anthropologists have developed unique, holistic, longitudinal and analytical study methods, they are able to provide valuable information about different culture systems and about what age and aging means to the individuals that comprise these culture systems. Although there are definite difficulties in anthropological theorizing and research, the value of anthropological input in social gerontology cannot be overlooked. Because it provides a wide overview of various aspects of human life, anthropology can serve as a valuable reference by which any one of the social scientific disciplines can check its tendencies to concentrate on very narrow issues and to present generalizations as though they have universal applicability. The importance of anthropology to the field of social gerontology and the futility of trying to encompass human life in a single theoretical perspective are pointed out throughout the thesis.

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CHAPTER ONE

INTRODUCTION

Gerontology, the study of aging and the aged, is a relatively new field of study with a broad, multidisciplinary focus on the life span and the processes of aging (Nydegger 1981:294). The two main branches - medical and social - are each subdivided into a number of specialties. Though the medical branch, now usually referred to as geriatrics, is focused primarily on the physical and psychological aspects of aging, and the social branch is concerned mainly with the non-physical aspects, the lines between them are considerably blurred. Physical and mental health factors impact on social and personal well being and on the relationship older people have with their society and culture (Barron 1961:25). The processes of aging and the position that older people have in their sociocultural setting are subject to modification and change (Riley 1981:1), because they are affected by pathological, psychological, physiological, cultural, sociologic, economic, and behavioral factors, all of which make up the subject matter of gerontology.

Academics from a number of social scientific disciplines have written about the concerns and problems in the feild of social gerontology and this has resulted in a great amount of redundancy and a vast proliferation of material, much of it addressed to narrow interests and specific issues. To break away from a continuation of these practices, it is necessary to take a wide overview of social gerontology and to look at new ways of studying aging beyond those that have been established by the disciplines which have been most dominant in the field. Anthropology has been a late-comer to social gerontological studies but it is already making increasingly evident many of the theoretical and conceptual shortcomings in the field. There is, as yet, a limited amount of purely anthropological literature in social gerontology, but what does exist serves to reinforce the necessity of both a holistic approach and longitudinal research methods.

Anthropology, like gerontology itself, is a broad field, bound by neither rigid methodology nor limited perspectives. It is concerned with historical reconstruction of traditional cultures, the diversity among human beings as manifested in their aesthetic and philosophical endeavors, and the principles which underlie the behavior of people in society in the diversity of their cultures (Murdock 1957:39). The goal of anthropology is to develop a body of verified knowledge which can lead to the formation of a unified anthropological theory of human behavior. Anthropology has had the connotation of the exotic, and in the past, because of the stress on historical reconstruction, anthropologists were interested in the elderly only insofar as they could serve as storehouses of knowledge about rapidly disappearing traditional cultures. Concern for the current conditions, roles, and statuses of the old is a recent development (Holmes 1980:272), but anthropologists studied age grouping and the meaning of age and aging in different traditional cultures and in different historical periods before turning their attention to the study of aging in complex societies (Neugarten & Hagestad 1976:37). This is the reason that there have been few longitudinal studies dealing explicitly with aging as it is experienced in different ethnic groups. Anthropologists are only now beginning to focus on how policies and programs effect other areas of social life, and on how the aging processes are affected by the attitudes and beliefs of professionals, practitioners, service personnel, the general public, and the aging themselves (Bayne 1980:2).

The Processes of Aging

Psychology was the first among gerontological disciplines to recognize that aging is a multidimensional process, or rather, a series of intersecting and interinfluential processes (Tibbitts 1960:7). This recognition was an important breakthrough in gerontology because it affected the theoretical perspectives in all of the social sciences and was influential in stimulating new approaches, ideas, methods, and interests in the field. The stress on the importance of chronological age had hampered social gerontological theorizing and research until psychological studies revealed that age is a very imprecise concept because it is associated with distinct biological, psychological, social, and behavioral components that do not correlate in a systematic way (Maddox & Wiley 1976:28). Biological age refers to the strength, cellular structure, physical development, and the condition of an individual at a specific point in time relative to his total life span. It is only loosely tied to chronological age. Psychological age refers to the adaptive capacities which have been acquired relative to the adaptive capacities required for optimal living in a specific environment, and it has both subjective and objective elements. Social age refers to the social roles and behaviors expected of an individual in relation to the other roles and expected behaviors in his society (Birren 1968:177). While biological age varies among people with respect to the effects of disease, chronic illness, nutritional practices, susceptibility to stress (Barron 1961:29) and the inheritance of physical capabilities, psychological age is affected by biological, cultural and environmental factors (Tibbitts 1961:29). Biological, psychological and social aging are interrelated processes which influence one another. Thus, at any period of life an individual is an aggregate of interacting factors, some developing, some peaking, some declining (Breen 1960:159), and the processes of aging have varying amounts of influence on one another at various stages in the individual's life.

Social factors such as the proportion of older people in the population, sex ratios, marital status, labor force participation, economic resource availability, income and situational changes, and the availability of opportunities for the maintenance of mental and physical health affect the processes of aging. Personal factors such as feelings of self worth, world view, family relationships, death of a spouse, attitudes from and toward others, interaction patterns and capabilities, and coping methods which have been developed through life also affect the aging processes. Although the biological, psychological, and social processes operate together to transform the individual over time, random events and environmental complexities effect individuals differently. Because the aging processes are in complex interaction which is unique to each individual, they vary around average trends which are characteristic of various stages throughout the life span (Birren 1968:177 and Tibbitts 1960:11)

Disciplinary Differences in Social Gerontology

A survey of the literature from the 1940's to the 1980's reveals the dominance of sociology in American social gerontology. It shows the major sources of influence in the selection and analyses of issues, the changes in interests and theoretical perspectives through time, and the stress that is put on the ideas of those who are considered to be major figures in the field at a specific time. Indeed, sociology has been the most riddled with controversy among all of the disciplines that contribute knowledge to social gerontology. This is due, in part, to the dominance of sociology in the field and the fact that it has a longer history of involvement than have either anthropology or social psychology. It is also due to the fact that sociologists have been foremost in raising issues, proposing hypotheses, and offering theoretical suggestions.

Sociologists study the social settings and the changes in them that alter the roles and statuses of older people, the effects of rapid social change which shift the structure and function of social institutions and alter the behavioral expectations for older people, and the nature of group formation and affiliation among the aged (Koller 1968:15). Since the beginning of sociological involvement in social gerontology, the issues that have received the greatest stress include retirement, widowhood, family relations and the roles of older people in the family structure, the nature of the relationships that old people have with friends and siblings, and the attitudes they have toward the processes of aging. Sociologists tend to overlook the heterogeneity in any of the groups they study because they try to create "model" groups in order to develop behavior profiles.

Social psychology, the branch of psychology that tests ideas from other disciplines by linking them with psychological knowledge to study the effects of inner changes on the relationship that older people have with their physical, social, and cultural environments (Birren 1968:177) has an affinity with anthropology even though the approaches and emphasis differ between the two disciplines. Both represent an attempt to get a larger overview of human social behavior by amalgamating ideas concerning both the individual and the society. But whereas social psychology, because of its psychological roots, tends to focus on the individual in his sociocultural setting, anthropology is focused on trying to obtain understanding of the individual, the society, and the culture, and to compare findings from different cultural and social areas. Kaplan (1960:420) wrote:

> "The development of social psychology as a discipline is testament to the inevitable fusion of individualistic and group emphasis in the study of man. Man is being increasingly viewed as a highly sensitive and flexible integration of the biological, psychological, and social. This integration takes place in a web of social myths, symbols, patterns, norms, traditions, explicit teachings, and implied sanctions. The way in which man responds and at the same time challenges or sifts the stimuli from all around him results in an observable or even measurable John Smith - who is, in certain respects (a) like all other men, (b) like some other men, and (c) like no other man."

Kaplan could just as readily have been discussing one of the aspects of anthropology because it, like social psychology, has shown that there is great diversity in human behavior and that heterogeneity is common to people of all age groups.

Age as the basis for the allocation of roles, resources, and rewards, the mechanisms which affect the possibility of social integration, adaptation of older people to personal and social change, and the cultural factors which affect the aging processes are of interest to both social psychologists and anthropologists. Anthropology goes beyond social psychology, however, since it shares an interest in cross-national and historically oriented studies with comparative sociology (Maddox & Wiley 1976:11). Many social scientists dislike the idea of cross-national research because they feel that the lack of standardization of research techniques and analytical methods make comparisons scientifically useless (Anderson 1960:375). There are others, though, who would agree with Maddox and Wiley (1976:10) who wrote:

> "Comparative research is basic to the scientific enterprise and its search for invariant relationships among phenomena of interest. For the social scientist, an anthropological and comparative sociological perspective suggests a fundamental and necessary challenge to all propositions about human behavior that are claimed to be culture-free and hence universally applicable."

Comparative sociology has focused on complex rather than on traditional societies, and the emphasis in its research has been on the comparison of the problems of old people and the effectiveness of the solutions that have been tried in different industrialized countries. Its findings have been attacked by those social scientists who believe that the social and cultural milieu in each of the modernized countries differs enough to make generalized statements about problems and possible solutions invalid. But anthropologists have stated that in studying the problems and effectiveness of the programs which were developed in Europe, the possibility of avoiding some of the pitfalls which had been encountered there could be enhanced.

Different ethnic groups influence each other and this enhances the heterogeneity, uniqueness, and diversity among older people. The effects of different cultures on one area or the effects of a common environment on different cultures as well as the effects different cultures have on one another and the ways these factors affect the older members of various culture groups have received little study (Marshall 1980:4), but these are some of the issues that are of interest to anthropologists.

Conceptual and Perspectual Difficulties in Social Gerontology

Social gerontology is in need of clarification of terms, concepts, and abstractions. There is, as yet, no consensus about how to define "old age". The terms "the old", "old people", "older people", "the elderly", "the aged", "senior citizens", and "the aging" are used synonymously throughout the literature without differentiating between the late middle years, the early post-retirement years, and the years of advanced age. Recent attempts have been made to segmentalize the older portion of the population into the young-old (beginning variously at 50, 55 or 60), the old (either 60 to 70 or 65 to 80), and the old-old (75+ or 85+), but there is no consistency in definition or usage. The need to come to terms with the concept of age will become more vital to future studies because the oldest segment (age 75 and over) is the fastest growing of the "old" portion of the population. Assuming the arbitrarily chosen age of sixty-five will continue to define the beginning of "old age" for most social gerontologists, lumping together the newly retired and those of more advanced age will become more problematic since the difference in health, and in financial and social needs between the two groups will continue to expand, a fact that has enormous implications for policy formation.

Much of the current literature is addressed to the "transition to old age" in reference to the age at which retirement or menopause or the end of child-rearing responsibilities has been reached. There may or may not be a "transition to old age", but there could just as conceivably be a transition to very old age, to a time when the probability of increased frailty and a decline in physical activity begins. At any rate, the "transition to old age" notion is static in that it appears to present "old age" as something an individual attains at a specific point in time. In attempting to portray growing older as a dynamic process rather than a "point in time" activity, many writers use the term "the aging", but since it is also used as a synonym for "old", it tends to muddle a process with a state of being. This problem is compounded by the fact that there is not a generally accepted explanation of "aging". Though it has been described as a sequence of events in the life span of an individual leading from a steady rise in strength and energy through a period of stability to a period of decline which culminates eventually with death, there is disagreement concerning the onset of "aging". While some social scientists define it as beginning at conception, others define it as beginning at birth, at the time when physical growth is completed at about age twenty, or at a point of maturity when a "general life review" occurs at around age forty or fifty. Most social gerontologists, however, continue to employ the term "aging" in reference to the conceptually vague "transition to old age" and the years beyond it.

Age status operates in conjunction with sex status. This holds true in any society because age and sex are important aspects of all social situations, although in varying degrees. Age and sex categorization are seen as necessary for the smooth operation of societal institutions and the preservation of their continuity through successive generations. Social roles and expectations for behavior are different for men and women, so aging is a different experience for men and women (Huyck 1974:10). In much of the American gerontological literature, aging men are discussed in terms of retirement and women in terms of their roles as wives and widows. Earlier studies depicted retirement as the destiny of men, and the anxiety it was purported to foster was deemed to be associated with the male need for career success, power, performance, and the need to be seen as a good provider for status reasons. Women, most frequently defined in terms of the men to whom they were attached, were treated analytically as destined to failure at the loss of the spouse and the resultant induced poverty. Their value was said to decline with age because of the loss of both physical attractiveness and child-bearing ability (Johnson & Williamson 1980:87). Attempts to explain the behavior or feelings of older people in terms of a single variable, such as sex, merely dissects a totality and offers a simplification of reality that explains nothing. But over-compensation can also be problematic. In attempting to avoid sexism, a number of writers discuss attributes that might be more typical of one sex or the other, but present them as though they are characteristic of old people in general. Much of the literature on "the elderly" is really about women because females outlive males and comprise the larger portion of those aged sixty-five and older.

No other topic of research in American social gerontology has received as much attention as has the concept of "suuccessful aging". This is a vague term which has been defined variously as adaptation, adjustment, psychological well being, morale, and life satisfaction. Research results have been inconclusive and muddled, in part because the concept is terminologically unclear, but also because there are so many variables involved with the concept that are difficult if not impossible to control (Markides 1981:125). Theories concerning "successful aging" are questionable because, though they stress the importance of health factors, income maintenance, family relationships, and the affects of retirement and widowhood on adjustment, they are applicable primarily to the situations of middle class Anglo-Americans and can add little information that would enhance knowledge and enable the development of a comprehensive and generalized view of aging. Many of the theories are based on survey research which has consisted mainly in the collecting of self reports of older people concerning the factors that researchers deem to be important. The subjectivity and biases in such research result in a great variance in the findings. As anthroplogists study behaviors of older people in America and elsewhere, they are able to refute earlier theories of "successful aging" and the factors that are said to enable it. Because of their emphasis on longitudinal research and their participant observation techniques, anthropologists are providing a fresh view point that can serve as the basis for new studies. And they realize that such studies have to consider other than Anglo groups because they are not "typical" of all people, and the patterns of aging which might be found among them are not necessarily the same patterns that are found among other peoples (Solomon 1973:92)

A continuous concern for perfecting methodologies, techniques, perspectives, and conceptual issues in gerontological studies is evident in all of the social sciences. It is important to note, however, that when something new appears, it is not adopted by all social scientists with equal enthusiasm. In discussing the development of social gerontology as a scientific field it is easy to give the impression that new techniques, ideas, theories, and issues occur in sequential order. The "new" does not replace the "old", however. Rather the two strains co-exist in various degrees of popularity within each of the disciplines. A third strain arises and is comprised of variously emphasized and integrated forms of old and new ideas. Because all of the social sciences are involved in the study of the same phenomena, albeit from differing perspectives, the adopting and borrowing and amalgamating of new and old ideas operates among as well as within disciplines. Dichotomies are generated in scientific circles and a marked increase in controversy is sparked. This is complicated by the fact that while the social sciences evolve in this fashion toward greater empiricism, applied disciplines and agencies involved in policy formation continue to demand information.

Policies for social action are formulated by public health and social welfare agencies, public and administrative bodies, adult educational and recreational agencies, private and voluntary associations, and all levels of governemnt. Their demands for information upon which to base their policies are colored by the fact that most of them are in the position to set boundaries on research studies in terms of time limits, economic consideration, and the focus of the research. Social scientists are faced with the difficult task of working within these boundaries while at the same time, developing reliable knowledge about alternatives and consequences of various actions under given circumstances, determining the needs and wants of people and bureaucracies in given situations, and developing the techniques necessary for the possibility of satisfying these needs and wants in the most efficient manner possible (Koller 1968:156). Attempts are constantly being made to fuse basic and applied research (Maddox & Wiley 1976:3) so that while studies of purely scientific interest are being carried out and theoretical controversies are being grappled with, the problem oriented nature of social gerontology has always to be considered.

One of the complicating aspects of social gerontology is that any social scientist who studies aging can consider himself a social gerontologist, expert in his own area of interest. Thus, there are many perspectives, approaches, and methods employed in the study of age and aging. The literature that issues from various kinds of research endeavors becomes more and more extensive and a total grasp of all the facets of the entire range of inquiry becomes progressively more difficult (Koller 1968:1). At the same time, ignorance of specialized areas of study fosters greater redundancy, the proliferation of controversies and narrow interest debates, and an increased chance of failure in reaching any kind of theoretical agreement (Nydegger 1981:284).

There are unsolved problems and unanswered questions in all of the fundamental social scientific perspectives. Their premises are both simplistic and extremely complicated because they are grounded on complex issues such as the nature of human nature; the differences between fact and theory, and between knowledge and beliefs; the lack of knowledge about the relationships between disparate variables; and the relationship between individual will and the laws of natural and cultural universes (Dimen-Schein 1977:xii). Anthropology is not free of controversy and dichotomous thinking. As in all of the other social sciences, there are theoretical, methodological, terminological, and conceptual problems and there are disagreements among anthropologists in general and among gerontological anthropologists. Anthropological knowledge and methodology, however, is vital to social gerontology because, though it cannot stop all controversy, it is proving to be effective in helping to rid the field of its plethora of narrow focus arguments.

Thesis Objectives

Today, every field of study that deals with human beings and their needs has a branch dealing with older people. A comprehensive and thorough analysis of all of the fields as they relate to social gerontology is beyond the scope of this present work. The concerns of this thesis have to do with the trends and difficulties in the formation of social scientific and social gerontological theory and their implications for the conducting of research and the formation and implementation of social gerontological policy. The focus is on the involvement of sociology, psychology, and anthropology in the field of social gerontology.

The merits of any subject can only be judged on the basis of knowledge. People can develop tolerance for ideas, even those that they cannot personally or academically subscribe to, through understanding, as far as possible, the historical background that gives rise to these ideas. Rejection of any idea should be based on other than ignorance. To discuss theory in social gerontology, it is necessary to know something of its historical roots and its developmental paths. The nature of social scientific theory and the background of its philosophical and empirical orientations are discussed in chapter two. Problems with the social scientific theories that provide the basis for the development of theory in social gerontology are examined in chapter three. The information in chapters two and three will make clear why there is no overriding theory of human behavior, and that, in our present state of knowledge, there cannot be one.

Chapter four consists of a discussion of the development of social gerontology. It provides a framework from which social gerontological theories can be viewed. Sociological, psychological, and anthropological theories as employed in social gerontology are discussed in chapter five. Some of the problems with the development, the application, the usefulness, and the controversial nature of these theories are examined in chapter six. Critical issues in social gerontological research, methodology, and policy formation are the topics under discussion in chapters seven and eight. Although anthropology and its influences in social gerontology and in the social sciences in general are discussed wherever they are pertinent and relevant throughout the thesis, chapter nine focuses almost entirely on anthropological gerontological issues and concerns. In chapter ten, the conclusion, a tentative solution to some of the problems under discussion is suggested. The present work represents a continual narrowing of topic, from social science in general, to social gerontology, to gerontological anthropology. The main objectives of this thesis, then, are to trace the theoretical development of social gerontology, to show why a unified theory of "old age" behavior is an impossibility, and to stress the importance of anthropology and its influences in the field of social gerontology.

CHAPTER TWO

THE NATURE OF SOCIAL SCIENTIFIC THEORY

Everyone attempts to objectify and categorize things, themselves, and other people in an attempt to create order, predictability, and an understanding of everyday life. In analyzing how things function and how people behave in various situations and circumstances individuals are able to define the options and the courses of action that are open to them; to adjust their own inner psychological, cognitive, and emotional activities; determine what constitutes appropriate behaviors in given circumstances and situations; and to develop, adapt, and change their life styles. When they categorize and analyze, people produce theories about how to run their lives. Their theories are based on knowledge, opinions, and beliefs, and though they can be wrong, they provide some sort of understanding through which people perceive and are able to cope with their worlds. In this sense, an individual's life is made up of thinking, developing theories, changing theories, and developing new theoretical ideas based on a combination of newly acquired knowledge and beliefs and on previous styles of thinking and theorizing (Dimen-Schein 1977:14).

The fundamental nature of social scientific theory does not differ significantly from the nature of theory in everyday life. Social scientists develop theories to categorize things, people, and events; to express expectations about how categories are related and how these relationships change; to formulate hypotheses about why certain things happen and other things do not; to enable the formation of predictions and the suggestion of possible solutions to social problems; and to guide the formation of new hypotheses and the operation of social scientific investigations. In the act of selecting there are always certain things that are rejected, and this places boundaries on the kinds of questions that are asked, the methods that are chosen by which to seek for answers, and the results that are possible in any study. Selected hypotheses are tested through investigations and replication of investigations, and are accepted, reformulated, or rejected on the basis of the results of such testing.

The term "theory" is problematic because it has several meanings. It refers to an integrated group of principles that provide a specific ideological orientation that defines a science and organizes its practical applications. It refers to a reasoned set of propositions supported by evidence that are used to explain various phenomena but these propositions are not firmly enough established or grounded in an ideological orientation to enable their total acceptance. Theory refers to an arrangement of ideas or research results that presents a systematic view of some event or thing. It refers to abstract knowledge of some behavior or phenomenon as opposed to the practice of that behavior or the knowledge gained through involvement with that phenomenon. And finally, theory refers to speculative views that are based on opinions and beliefs and past experiences that have proven the "correctness" of these opinions and beliefs. Speculative theory is essentially subjective, and therefore, individualistic. There are, then, different kinds of theories, and social scientific theory consists of all of these forms of theory except the first.

Social scientists study human behavior, human needs, and human attributes. Human life is complex and not easily defined and explained. The ideas that social scientists express are never clear cut, but consist of a combination of social criticism, impressionistic observations, speculative theories, and scientifically developed "facts" (Atchley 1972:22). Research is slow, painstaking, cautious and exploratory, and its conclusions are tentative and conditional. Hypotheses can never be completely confirmed or refuted. They usually imply cause and effect but this is very difficult to test for two reasons; social phenomena arise and persist long after what caused them can be known, and people have both subjective and objective consciousness which colors their perceptions, and therefore, explaining anything about humnan life in terms of either directly observed or historically "known" social processes or in terms of informants' self reports is extremely problematic and inconclusive. A researcher's personal, cultural, and disciplinary biases are an unavoidable part of every study, too. This means that social scientific research and theory are more impressionistic than scientific, and though inferences made on impressionistic ideas are frequently assumed to be valid, they have a very high probability of being wrong (Atchley 1972:25). The perfection of technique, methodology, and theory is an "ideal", but social scientists have to settle for something less (Koller 1968:143). That there can never be a truly objective and non-evaluative social scientific stance is aptly illustrated in the words of Dubos (1981:204) who wrote:

> "One of the new certainties of our age is that science cannot be purely objective as used to be believed. In their selection of problems, in their approach to them, and in the application of their findings, all scientists - unconsciously if not

> consciously - are influenced by considerations of relevance to systems of value. We are concerned not only with human lives but also with life as a principle."

The Background of Social Scientific Theory

The social sciences arose from the base of several philosophical belief systems through which human nature - its existence, its attributes, its moral foundation, its "goodness" or "badness" - was variously questioned. The earliest discussions of human social behavior consisted of philosophical writings about the ways that individuals organize themselves into integrated, coherent, operating social systems. Social values were explained as arising from consensus born of the collective conscience and were seen as the basis for norms which fostered stability in the social system and conformity in the individual. The consensual view, rooted in the philosophy of Durkheim (Dowd 1980:11), was countered by the views of Max Weber who defined social action as all of the behaviors which occur when, and only insofar as, the acting individuals give them subjective meanings, and that because people orient ther own behavior through the actions and responses of others, subjective meanings become shared meanings (Hochschild 1976:71).

The consensual view of social behavior laid the ground work for the development of functionalism, a theoretical perspective through which society was seen as a structured and patterned entity comprised of a collectivity of individuals, and like an organism composed of mutually dependent parts, it was thought to have survival needs beyond those of its individual members. Because of the organic analogy, the determinants of social behavior were found to be a mixture of biological and cultural factors in a relationship which was governeed by the normative forces that were operative in all social processes. The focus of functionalist research was on the patterned behavior enacted within social institutions, or in other words, on positions and roles. It was believed that because physical and natural laws were shown to exist, social laws could be found that would define and explain human behavior. Social phenomena examples were organized hierarchically and arranged in taxonomies using the methodologies of the biological and natural sciences because empiricism was defined as the seeking of causal factors with the view to presenting social laws in terms of cause-effect relationships.

The American social sciences stem from a combination of European philosophical and British empirical influences. The philosophical orientation is rooted in an amalgamation of European idealism, the views of Durkheim and Weber, Marxist and neo-Marxist theories, the Darwinian concept of selection, biological concepts of conflict and competition, psychological concepts, psychoanalytic theory and the American cultural values of rationalism and individualism. The empirical orientation owes its existence to the influences of rationalism, progressivism, and positivistic empiricism. The intellectual tradition of positivistic empiricism, briefly stated, stresses objectivity and trusts only in directly observable "facts" rather than in inferences that could be made about relationships and meanings. The main thrust of positivism is the search to attain scientific validity in terms of empirical methodology, analyses, and model building because it is believed that generalizations can issue only through proper scientific procedures. Positivistic empiricism is materialistic in the sense that it rests on the belief that behavior and cultural phenomena can be studied without reference to either idividuals or meanings. People, in this view, are objects of meaning rather than assigners of meaning (Hochschild 1976:71).

The philosophical aspect of the social sciences with its historical and psychological orientation counters positivism. Whereas the empirical tradition stresses realism, the belief that "reality" exists out there in the empirical world and can only be sought and verified there, the philosophical tradition tends to stress idealism which is the belief that "reality" exists only in human experience and is definable only in terms of how people conceive of their experiences and how they perceive their worlds (Blumer 1969:22). Proponents of the philosophical orientation are critical of "scientism" because they feel that stress on trying to establish scientific validity through strict adherence to specific operational procedures in every area of research, replication, and hypotheses testing obscures the need to find out if any of these scientific demands reflect the true nature of the empirical world. Blumer (1969:29) stated that the belief that proper scientific procedure automatically yeilds valid results negates the fact that there are many false premises, inaccurate concepts, unverifiable interpretations, and a great amount of distorted data within those proper procedures.

The philosophy that underlies the training of a social scientist holds that a scholar should have as broad a base of understanding of his discipline as possible and that he should be exposed to a variety of ideas and influences so that he can develop his own personal intertest areas. This training allows the development of diversity of scholarly backgrounds within a single discipline. Because social scientists adhere variously to the different philosophical views that underlie ths social sciences, and because they vary also with respect to the amount of credence they give to empiricism, the climate has existed for the development of a number of different "schools" to be established in each discipline. Nevertheless, a social scientist from a specific "school" brings a unique set of factors into his work. Influences from his own and other disciplines add to the complexities of his thinking and help to determine the way he will analyze and interpret his data. All social scientists tend, as they become aware of specialized work being done in any of the disciplines, to incorporate those concepts, ideas, terms, approaches, and points of view that they find appealing and enlightening. They are not consciously aware of all of the factors that influence them and help to form their personal and academic biases. That these hidden and unsuspected biases exist but are not under the investigator's control has enormous implications for theory building, research methods and findings, and for policies that are based on such research and theory.

Criticism of Theory

It is easy to understand, in light of the foregoing discussion, why there is a preponderance of theoretical criticism among social scientists both within and across disciplines. Though criticism is necessary, critics should take into account the historical roots of the circumstances and events that gave rise to a particular theory. Because human life is comprised of a complex and ongoing interrelationship of various factors, any theory of behavior is static and can only apply to small segmented portions of social life. It can readily be seen that social scientific thinking can be wrong, but even error can be enormously useful (Toffler 1970:6). Even the most tentative of generalizations can stimulate new thinking, produce new study methods, and generate new hypotheses.

When replication confirms the results of a theory it is said to verify that theory. This does not mean that "truth" has been found, however. It shows, rather, that a certain explanation appears to be more plausible than other possible explanations. The ongoing nature of theory building means that new views arise from prior views and that later studies continually modify and alter the findings of earlier studies, thus, a once verified theory can later be refuted. Criticism is necessary, then, because it forces social scientists to recognize the static and limited nature of their theories, to check the tendency to force certain answers to the questions they ask, and, when properly conducted, it forces an intellectual and investigative process which goes beyond the acceptance or rejection of a theory on the basis of personal bias. Very frequently, criticisms aimed at theories are invalid because they muddle different kinds of theories by comparing a plausible hypothesis with an impressionistic idea, for instance. Usually, however, critics are unaware that they are doing so because they do not consider that the term "theory" has different meanings.

Difficulties in Anthropological Perspectives

There are difficulties with the perspectives used in any of the social sciences and they create controversies and disagreements among social sciences within and among disciplines. Although the issues of contention vary from one discipline to another, a discussion of the difficulties in anthropological perspectives will serve to illustrate some of the problems in the social sciences. The "etic" approach used by anthropologists in the study of cultural phenomena was influenced by British structural-functionalism. Social anthropologists, notably Malinowski and Radcliffe-Brown, analyzed the functioning of societies, and though their studies represented a more thorough and systematic method of attempting to understand the operation and structure of social systems than did the American cultural anthropologicaal concentration on cataloguing culture traits and customs (Dimen-Schein 1977:15), both stressed empiricism and helped to give anthropology scientific legitimization. The "etic" approach relies upon formal and objective propositions of behavior, and the generalizations that result define a "scientific reality" that need represent no other reality. The individual is there, but as a measurable object, and through his actions he defines the culture which is, itself, a measurable entity. "Etic" studies do not add to descriptive and interpretive knowledge (Bohannan 1981:29).

The "emic" approach was influenced by the development of symbolic structuralism which arose from the culture-and-personality studies of the 1930's when meaning, psychoanalytic concepts, personality factors and other psychological conceptualizations were employed in the study of behavior. Some anthropologists amalgamated these concepts with functionalistic ideas while others attempted to break away from functionalism altogether. In the "emic" approach, attempts are made to analyze a culture by getting the views of their informants as they perceive and experience their worlds. Behavior is seen as something more than overt and is defined as a complex of cognitive, personality, and mental processes which is constantly influenced by the culture code people use to negotiate with each other and with their environments (Fry 1981:3). The "emic" approach generalizes from individual statements of perception but informants' perceptions are colored by their positions in the group, their own value judgements, and the kind of involvement they have with the aspect of their culture that is under study. While the "etic" approach might be relatively valid for a society at some point in time, and the "emic" approach , for a culture at some point in time, both stress consistency, yet anthropologists, as have social scientists in other fields, have found that conflict and competition exist and there are imperfections in all social systems. Neither approach is reliable as a comparative device because differences and similarities found among the traits and characteristics of various cultures are meaningless unless the historical processes that underlie them are known for each culture system. While the "etic" approach suffers from objective reductionism, the "emic" approach suffers from subjective reductionism, neither of which can define behavior. There are unresolved issues and disagreements among anthropologists who follow one approach and among those who follwow opposing approaches.

Often when anthropologists study unfamiliar settings, they tend to focus on social and cultural factors, but when they study familiar settings, or as foreign settings become more familiar, they focus more on people. Thus the degree of empiricism in any research project can change since it often reflects the purposes and constraints of the study. In general, anthropologists try to follow a middle-of-the-road approach rather than deal with "emic" and "etic" approaches as opposing perspectives (Pelto & Pelto 1978:63). This accounts, in part, for the criticism that is leveled against anthropological analyses which are accused of exhibiting muddled thinking and faulty interpretations. But those anthropologists who favor description without attempting an explanation in an effort to avoid both controversy and oversimplification do not make even the most tentative generalizations which could help to clarify social scientific thinking and they add very little to their own or to related disciplinary knowledge (Bohannan 1981:29). Dimen-Schein (1977:xvi) summarized some of the problems in anthropology and pointed out the necessity of being aware of them by writing:

> "Anthropology contains value judgements, for social science is one part of the ideology of industrialized society. Like all ideology, it can obscure as well as reveal; it can function to justify as well as to condemn the current social order. Moral and scholarly honesty therefore require us to kep a continuously self-critical eye on the ideas we create, in order to be aware of our distortions and our own blind spots."

The complex nature of social scientific theory lies behind the difficulties inherent in conducting research and in formulating and implementing policies. The complexity and consequences of these difficulties have important implications for the way social gerontology developed and for the current trends and problems that plague the field. In order to appreciate these difficulties, it is necessary to examine the background of specific social scientific theoretical perspectives that gave rise to the problems in social gerontology.

CHAPTER THREE

PROBLEMS IN SOCIAL SCIENTIFIC THEORY

A large number of theories have been developed in the social sciences in an attempt to account for behavior associated with different age groups and with different social climates. Although some theorists have tried to adapt theories relating to socialization or maturation, for example, to study aging, only those theories that have had a significant impact on the development of social gerontology will be examined in this chapter. These can be referred to as role, psychological, and interpretive theories.

Role Theories

All societies are in a constant process of change, but the more complex a society is, the greater is the bombardment of stresses, strains, deviances, and conflict on the social system. Functionalistic role theories tend to be static and mechanistic since they emphasize the tendency toward conformity as depicted by the structure of a social system at a particular point in time (Dimen-Schein 1977:15), and they cannot deal effectively with social change. They present people as differing only with respect to the roles they enact and the positions they fill, so in addition to having problems with change and conflict, role theories have problems with behavior and meaning. In any attempt to deal with processual phenomena, role theories have had to undergo constant revision. As theorists borrow and amalgamate processual concepts they are hampered by having to argue from their functionalistic perspective, and their theories tend to become increasingly complex and convoluted.

In the earliest sociological role theories, a status was defined as a position which was to be filled by a person who enacted a role according to the expectations for behavior that were associated with that status. Statuses were defined as being arranged into a social structure and ranked relative to each other according to the value or prestige the societal members assigned them (Vivelo 1978:107). Deviance was explained away as "idiosyncratic behavior" which was "outside the perspective of conventional structural analysis" (cf. Rosow 1976:459 and Williams 1960:268). Social anthropologists viewed culture as an entity that arose and changed as a result of social processes, and social institutions were defined as "the established norms of conduct or rules that specified and guided behavior". But cultural anthropologists who viewed the social system as subordinate to culture believed that social phenomena arose and were controlled by the ideals for reciprocal behavior patterns which were carried in the minds of individuals. Although "social institutions" and "cultural ideal patterns" were names given to the same phenomena (Voget 1975:386), social scientists were polarized in an ongoing and unresolved conflict concerning whether "society" or "culture" is the most important and superior in defining and controlling social behavior.

In his analysis of roles and positions, the cultural anthropologist Ralph Linton outlined five categories (sex and age, occupation, family and kinship groupings, friendship groupings, prestige rankings) in which each individual holds a position under the guidance of the cultural ideal patterns. His work caused other social scientists to conceptualize the key concepts of "role" and "staus" in a number of different ways. The term "status" was used by some to refer to the sum of an individual's positions, and "role", to refer to the sum of all of the roles he enacted. But the difficulties inherent in using a single term for multiple referents became apparent in discussions concerning position changes that did not alter the other statuses in a person's repetoire. Merton developed the concepts of "status set" and "role set" (Rosow 1976:459), but these terms were shown to blur the distinctions that were necessary for the analysis of normative behavior patterns that change differently in different position categories through the life cycle. A brother, for instance, remains a brother whether he is four years old or fifty, and whether he is a school boy or established in a profession.

Some social scientists were pointing out the difficulties associated with role analysis and its failure to differentiate between specific roles and positions as they involve different people. The role of brother, for example, is experienced and enacted differently by a white, Anglo-American farmer than it is by a black unemployed urban male. While some social scientists were grappling with role and status concepts with respect to their influences on society, others were employing psychological conceptualizations to discuss the influences of roles and statuses on personality development. For the latter, the term "status" became, eventually, to be used in reference to an individual's social worth, and the concept became increasingly complex as social scientists discussed the differences in staus as associated with the different positions that an individual fills. A kind of multifaceted permanent status system consisting of social class, wealth, occupation, power, authority and education factors was identified and said to operate together with the status standings assigned an individual's various positions (Krech, Crutchfield & Ballachey 1962:313).

Controversial arguments as to whether roles and statuses must be seen as two sides of a single coin or could be viewed as separable, though related entities, were carried on in all of the social sciences. Talcott Parsons, a structural functionalist, and a major figure in American sociology, assimilated aspects of the works of Durkheim and Weber and melded them in a framework which was later accused of suffering from biological reductionism (see Dowd 1980:5 and Hochschild 1976:71). In an attempt to explain deviance and nonconformity, Parsons introduced the concept of role strain, a phenomenon brought on by ill defined or conflicting demands and expectations in an individual's various positions (Williams 1960:265). Whereas Parsons believed that roles and positions were inseparable, Rosow (1976:459) developed a typology whereby they could be separated. He stated that only institutionalized roles with strong norms and explicit expectations co-existed with statuses, and he identified a number of "tenuous" and "informal" roles which have both social and interpersonal relationship functions, but no positions, a concept that he later applied to the study of aging. The term "role" is used variously in reference to ideal expectations for behavior, to what most people do in a given situation, to what a particular person does in a particular position, (Atchley 1972:100), and to all of the roles that a person enacts at a specific point in time. This, together with the difficulties involved in the status-position controversies discussed above, renders role theories conceptually unclear and makes the analysis of their contributions difficult, controversial, and unresolvable, and though there are other ways of analyzing social phenomena, role theories continue to find favor among some social scientists.

Psychological Theories

Social psychological role theorists have suggested that in modern, industrialized societies, the possibility of vertical and horizontal mobility causes social or "status" striving which, when frustrated, can lead to deviant behavior, stress, combatitiveness, competitiveness, restlessness, and revolutionary fervor (Krech, Crutchfield & Ballachey 1962:337). Some theorists have stated that healthy adjustment and the maintenance of self esteem and personal dignity relies on the individual's ability to remain satisfied with his way of life and his social class designation. But because very few people can live in society without experiencing at least some maladjustment in role enactment and some difficulties in achieving a validation of the self, there is almost always a constant struggle to retain one's sense of "place" in the society (Atchley 1972:88).

Psychologists who are interested in social exchange theory conceive of exchange relationships somewhat differently than do sociologists. Exchange relationships are depicted as dyadic transactions between people but the unit of analysis, for most sociologists, is the transaction itself through which negotiations among social actors are carried out to determine the value of resources. And whereas some sociologists tend to consider only those things which can be used involuntarily as constituting "power", other sociologists and social psychologists include such attributes as influence, persuasiveness, and friendliness, for example, as valid powers in exchange relationships because they feel that personal and emotional factors co-exist with "power" as basic elements in transactions (see Dowd 1975:592 and Dowd 1980). Pychologically, social exchange transactions are seen to be competitive, calculative, or individualistic, because people are defined as seeking economic, psychic, or materialistic rewards for different reasons including egoism, materialism, and altruism (Maddox & Wiley 1976:18). Psychologists theorize that friendships among people of similar backgrounds, sex, age, life styles, social class, and value systems are the most successful because at very low cost, each person can provide consensual validation of the self to the other. Mechanisms which are developed to avoid the costs of conflict include coalition formation and the development of norms of exchange within groups to inhibit the abuse of power (Secord & Backman 1964:288).

The social structural theory of self holds that continuous membership in groups provides reasonably stable expectations, roles, positions, and contemporaries, but with change, people have to categorize others and themselves differently in new social structural and personal environments. People tend toward congruency, however, and operate in all situations to try and bring it about. Social and situational changes lessen self esteem because it threatens their feelings of pride, usefulness, competence, and self sufficiency, and in doing so, it threatens the validation of the self. But in striving for equilibrium, people tend to modify their behavior and to adapt to changes in situations and circumstances through interaction with others who are experiencing the same changes (Secord & Backman 1964:598). In this way they develop coping mechanisms which are more apt to be seen as valid because they are not developed in isolation, but through interaction.

Psychological continuity theories show that change is part of life, and though it can be problematic when it is very rapid or when many different kinds of changes impact on the individual at once, change occurs within continuity. Dissonamce theory is related to social exchange and role strain theories in that it is used by psychologists to discuss situations in which people must choose between equally attractive alternatives or situations in which they are forced to behave contrary to their attitudes. People make sense out of things and give them meaning through interaction with others and through the cultural resouces in the society (Marshall 1980:92) but in situations in which it is hard to establish meaning and sense, or which threaten the self attitude, people can sometimes appear maladjusted. People react in different ways because of their unique personality factors and the consequences of coping methods they have used in the past.

A number of psychological theories are concerned with the importance and the impact of crises in peoples' lives. Some theorists base their theories on Erikson's work in personality studies. It was his belief that personality development depended upon crises arising at critical periods and bringing perspectual changes, and a healthy personality resulted from successful resolution of these crises. Since every crisis has consequences that bring changes in the life course, they mark the major turning points in life and are, thus, necessary to the development of maturity. In time, the term "crisis" became associated with non-developmental phenomena such as tension and stress, and crises were seen as non-episodical but detrimental to the developmental stages of life because they could alter one's sense of timing, threaten self identity, and produce physical and mental health problems (Perun & Del Vento Bielby 1979:284).

The influence of psychoanalysis and the concepts of Freud and Jung are noted in psychological theories but there is little empirical evidence to substantiate their tenets. Most psychological theories are individualsistic in that though they account for the differences in human reactions by referring to differences in personality systems and in perceptual tendencies, they tend to overlook social and historical factors that impact on psychological development and the manifestations of psychological differences. Continuity theories stress the belief that people consistently seek for congruence and balance, but this "need" has never been satisfactorily shown to exist. Rather, people tend to be able to incorporate change, to live with ambiguities and contradictions, and to tolerate conflicting events and feelings.

Interpretive Theories

Cognitive theorists from all of the social sciences have developed interpretive theories which emphasize the construction of social reality through social interaction. Individuals are said to gain control over their lives and the various situations in them through interaction in which societal institutions are developed, defined, and changed (Dowd 1980:6). Shared knowledge does not exist because of internalized norms but because of central, agreed upon meanings. Interpretive theorists have defined three aspects of "meaning" which include a more or less coherent philosophy which is used to legitimatize and interpret events; an orientation within each individual which relates to integrity; and a multitude of specific attitudes toward events and conditions which constitute the orientation from which a philosophy is articulated (Hochschild 1976:85). All interpretive theories are concentrated on everyday interaction situations rather than on extreme and pathological behaviors (Back 1976:413), but there are a number of differences in the way everyday behavioral situations are interpreted. Interpretive theories reflect the influence of reflexive sociology, social psychology, phenomenology, ethno-methodology, and the anthropologically developed symbolic interaction theory as well as the works of cognitive theorists and of Weber and Marx (Tindale 1978:169). While symbolic interactionists focus on shared meanings and symbols as they are exposed through language and gestures and developed through negotiations and interpretations, ethno-methodologists believe that people use their personalities differently in different negotiation situations and are, thus, in a continuous process of creating their own life styles. Symbolic interactionists hold that there are precarious and constantly shifting patterns underlying actions and events, and that they give a certain stability and continuity to social realities in terms of rules, institutions and the like regardless of the interpretive procedures employed by the interacting individuals. Ethno-methodologists, on the other hand, insist that social realities, including their symbols and meanings, exist precariously because they have no independence apart from the behaviors of the interacting individuals (Hochschild 1976:85). Though it would seem that interpretive and role theories are in opposition, they are related insofar as both kinds are based, metaphorically, on the concept of theatre performances. Gestures, appearances, speech, and behavior all present expressive fronts and occur within a "stage" or "frame" which exerts certain constraints and freedoms.

In the interaction theory of presentation it is held that people judge each other on the basis of appearance, socioeconomic status, behavior, sex, and age, all of which are "presented" in interaction situations, and that they bring the information they amass to subsequent interactions. This allows the definition of situations and the formation of expectations, but it also allows people something upon which to organize their own actions in order to try and bring about desired responses. Untested assumptions and stereotypic beliefs that people hold about others (Goffman 1959:1) and the messages that they send from their own perceptual and belief systems bring reactions from others, but they are not always the reactions that are desired. People possess certain social characteristics and expect certain appropriate treatment from others in keeping with these characteristics. In demanding certain desired behaviors from others, or when interacting in a new situation with unknown others, people can project claims to be what they are not and they have to develop strategies to protect their projections or to compensate for stereotypic assumptions that others hold. These include the use of tact, reserve, and various kinds of defense mechanisms, for instance (Goffman 1959:13). Interaction theorists speak of fronts that accompany roles. A setting, manner, appearance, and ways of defining situations are required by certain specific circumstances and tend to become institutionalized in terms of abstract stereotypic expectations which give rise to the stability and specific meanings that are associated with those circumstances regardless of the event which is occurring. An actor' finds that when he takes on an established social role it has a particular front already established for it. A person has several established fronts, and when faced with unstructured social situations, he tends to choose from among these fronts to project what he hopes is appropriate behavior (Goffman 1959:27).

Blumer (1969:22), a major figure in the development of symbolic interaction theory, believed that reality exists only in human experience and in the meanings people give experiences. The empirical world was seen to exist in the form of human perceptions and their contentions of them, and because these could be contested, they were defined as comprising reality. Blumer (1969:46) wrote:

> "The basic premise of symbolic interactionism (is that) human group life consists of the fitting to each other the lines of action of the participants; such aligning of actions takes place predominantly by the participants indicating to one another what to-do and in turn interpreting such indications made by the others; out of such interaction people form the objects that constitute their worlds; people are prepared to act towrd their objects on the basis of the meanings these objects have for them; human beings face their world as organisms with selves, thus allowing each to make indications to himself; human action is constructed by the actor on the basis of what he notes, interprets, and assesses; and the interlocking of such ongoing action constitutes organizations, institutions, and vast complexes of interdependent relations."

People put themselves in the role of others, and in role-taking, they view themselves from the outside, as objects. This internal self communication and self indication makes the self aware of objects and of what lines of action are relevant and possible (Blumer 1969:16). In considering the acts and the impending acts of others, people define role requirements, social rules, and motives. They consider, abandon, revise, replace, check, or intensify their own actions in relation to the actions of others (Blumer 1969:8).

Culture is the process of fitting together the customs, norms, values, rules, and traditions of a group of people, and society represents the act of fitting this process into social positions, roles, prestige, and authority (Blumer 1969:6). Culture and society are developed through the negotiating techniques and other human abilities that are used in daily interaction. Conflict occurs because people "misread" each others' intentions and meanings, and because people can decide to disagree, to ignore others, to follow rules rigidly, or to express themselves more freely (Goffman 1961:9). People band together in social groups which they perceive to be distinct social entities that provide them with moral support, shared attitudes about out groups, a sense of identity which confirms their reality as individuals and as group members, and an orderliness that arises from the rules and expectations (Goffman 1961:10).

Symbolic interactionists believe that verbal and nonverbal behaviors are clues to the meanings and personalities of individuals and that these can be inferred by watching behavior in different contexts and in different situations in a single context and comparing it with the behavior of other people in similar contexts and situations. But since similar settings can produce very different interaction patterns, each situation has to be understood in terms of the sex, age, educational level, marital status, and socioeconomic condition of each of the interacting individuals (Jacobs 1975:122). Interactionist theories cannot omit emotional, personality, or self-interest factors.

Because there are numerous ways of analyzing social scientific data, and because there exists a range of perspectives and approaches in each of the social scientific disciplines, an analysis of theories as they appear in any one discipline is very difficult. Social gerontology arose as a social scientific field long after the controversies and complexities in social science in general were established, and since it gets its impetus from all of the social scientific disciplines, it is an enormously complex field of study. The theoretical perspectives that have been examined in the foregoing pages provide the basis for social gerontological theories. An understanding of the theoretical stances is important, not just academically, but for a very practical reason. Gerontological theory is translated into public policy, and both should be as accurate and effective as possible if they are going to be useful in enhancing the understanding of aging and the quality of the lives of older people.

CHAPTER FOUR

THE DEVELOPMENT OF SOCIAL GERONTOLOGY

Medical, philosophical, and social commentary writings published in Europe and America from the sixteenth through the nineteenth centuries laid the groundwork for contemporary social gerontology because they focused the attention of the public and of governmental agencies on the needs and attributes of older people (Barron 1969:3). The act of growing old, however, was seen as a social problem before it was deemed a social scientific problem. Social action to alleviate immediate problems began first with trial and error methods, and eventually, there was a demand for justification for the use of public resources in the care of the old. As data was accumulated, the necessity of a systematic and scientific approach to the study of aging became apparent. Thus, by the time aging became a social scientific problem the complexities of the field had already been established giving social gerontology its dual nature with emphasis on both problem oriented and purely scientific research (Strieb 1981:245).

Ancient philosophical writings have shown that an interest in aging has occupied people for thousands of years (Gryfe 1980:124), and they reveal that the old have always been viewed with ambiguity. Hebrew writings admonished the young to care for their elders and not to cast them aside in their time of need. The athletic prowess and military might of youth was glorified in ancient Greek culture, but at the same time, veneration and respect for the aged was stressed. In like manner, the Roman value system was dominated by the ethos of the citizen soldier who was considered past his prime by the age of forty five, yet older men were dominant in their households and in civic and judicial affairs. Nevertheless, in Greek and Roman writings and drama, old men were negatively characterized and frequently portrayed as being miserly, lecherous, vicious, and tyrannical (cf. Tibbitts & Donahue 1960:79 and Koller 1968:67). The cultural view concerning the worth of the individual together with the social perception of need have always impacted on the social treatment of the old, but in complex societies, they have impacted on the social scientific treatment of the aged as well. Social scientists are unable to concentrate only on scientific phenomena without reference to cultural values and social perceptions. In their attempts to seek for scientific knowledge they are consistently made aware of the need to try and modify or eradicate erroneous social views which, once established, are difficult to change. Thus, they are forced to try and develop a balance between dispassionate scientism and philosophical humanism (Koller 1968:156). The ambiguities in both the cultural and the social views concerning older people, as will be shown in the following chapters, lies at the very heart of social gerontology.

The Roots of the Problem Orientation of Social Gerontology

Both ancient and more recent documentation has made evident that the old have required a certain amount of specialized care in all cultural settings and at all times. During Medieval times, for example, older serfs were guaranteed food and shelter but when feudalism ended in the mid-fourteenth century, there were enough older people who were ill, needy and abandoned that the Catholic priesthood had to set up and administer almshouses and hospitals to care for them. The very young, the weak, and the old were excluded from the rigors of frontier life in Colonial America where advanced age was a rarity. Only in the more settled areas, upper class Southerners and religious communities provided the best care and greatest security for their older members (Koller 1968:70). It was only in Western cultures characterized by industrialization, urbanization, medical research, technological and scientific advances, and improvements in both sanitation and nutrition, however, that the prolongation of life resulted in a marked increase in the number of older people in the population (Burgess 1960:3). The increase in numbers alone made the problems of the old more visible and was instrumental in qualifying older people as a specific and pressing social problem in need of generalized social remediation.

Solutions to specific problems began in most industrialized countries with the development of pension systems and this was usually followed by some sort of public housing program. Social welfare for the aged began earliest in Europe but because of the differences in ideologies and social goals, it took different forms in different places. An old age pension system with payments indexed to pre-retirement earnings was begun in Germany in 1889. The philosophical view in the United Kingdom was one of equality and laws were passed in 1908 insuring that all old people would receive a guaranteed amount of income whether or not they had ever been part of the labor force (Koller 1968:86). Canada's pension system, begun in 1927, mirrored that of England (Chappell 1980:36). It was not until 1935 that the United States legislated social security measures in response to pressure groups who demanded relief from some of the social problems occasioned by the Great Depression (Burgess 1960:27).

Social commentators contrasted reciprocity among kin and the care given to the old in preindustrialized countries with what they viewed as the decline in moral obligation of adult children in industrialized countries. They blamed the need for codified laws on the breakdown of family responsibility brought about by the instigation of pension systems, public housing and medical care programs, and community service organizations. Indeed, most of the industrialized countries enacted laws by which neglectful families could be prosecuted. Italian law, for instance, allowed support claims to be laid by the old who were disabled and needy against distant relatives and in-laws while those of France and the Netherlands, though similar, were applicable to near relatives only. West Germany was divided into regions each of which had an office staffed with personnel who were empowered to instigate legal action against families for the neglect and non-support of older kin. In most industrialized countries, such laws have been revoked because effective medical and social services have made them unnecessary, as in England; public sentiment has mitigated against forcing adult children to care for the elderly, as in the Netherlands; or they have seldom been invoked because older people have always received adequate care in extended family situations, as in the semi-agricultural countries of France and Italy (Burgess 1960:277).

The social problems facing older people are deemed to be similar in all the industrialized countries, differing mainly in degree and attempted solutions. They have been identified as inequality of employment opportunities, inadequate income, unsuitable housing, limited social opportunities, insufficient provision for mental and physical health, inadequate special services, and a lack of meaningful post-retirement activities.

The Development of Empiricism in Social Gerontology

The earliest actual scientific research in all of the industrialized countries occurred in the medical and biological sciences. Physicians involved in the direct care of older people became increasingly interested in the process of human physical aging because of the need for more knowledge concerning the treatment of chronic and multiple diseases. Biologists, in studying age related changes in the behavior and physiology of animals, were inspired to try and understand the significance of aging in the human life cycle. Psychologists were influenced by biological and medical research and began to focus on personality changes and mental functioning of older people. Anderson (1960:355) wrote:

> "...interest in the biology of aging and the medical care of older people antedates interest in psychological and social care and seems to be further along in its development in most countries, including our own."

Germany was one of the earliest countries to employ long-range rather than cross-sectional analyses in the study of old age. There, where social scientists emphasized psychological studies, intelligence tests were developed together with a method for repeat administration at five year intervals in an attempt to distinguish age changes in intellect (Anderson 1960:366). A regime was developed in Sweden in which all people were tested for physical fitness at the age of sixty and those who were healthy enough could remain in the work force, undergoing retests every two years. In the Netherlands a system was devised whereby questionnaires administered through local health agencies could be analyzed in a central office which keeps up-to-date records on the health, social, and financial needs of the elderly across the country (Anderson 1960:370). In general, the emphasis in European social gerontology has been on social action programs while in North America much of the gerontological research has been concerned with the processes of aging (Koller 1968:85). Anderson (1960:355) explained the differences in investigative procedures and program implementation in writing:

> "Each group of scientists in any of the industrialized countries moves through its own historical development as it goes from seeking solutions for simple to more complex problems. Any one country may have limited research done in a particular aspect of a scientific endeavor while another is scientifically sophisticated in that same aspect."

Developmental Difficulties in American Social Gerontology

The traditional philosophical nature of the social sciences in Europe favored a speculative, theoretical approach which allowed a more holistic view of human beings than did the empiricism stressed in Great Britain and North America where numerous studies in narrow areas of interest fostered greater segmentalization. The earliest American psychological studies were highly specialized and consisted of testing sensory perception, learning abilities, enzyme activity, hypertension, skin elasticity, physical fitness, and changes in vision, hearing, and physical appearance (Birron 1968:177), and the earliest sociological studies consisted of demographic and economic analyses (Tibbitts 1960:4). American social psychologists involved with social gerontology began to conduct specialized studies of job performance, the effects of age on mental health, and the effects of dependency on personality in the public at large. Sociologists were influenced and began to study social adjustment, retirement, and living arrangements of older people. While psychological knowledge was being applied by the helping professions in the form of preventative programs and practical curative measures (Birron 1968:185), sociological studies of the 1920's, 1930's, and 1940's were aimed at providing information for the applied disciplines such as housing, social welfare and economic agencies (Jacobs 1975:v). Little funding was allocated for purely social research prior to World War II, however, so social gerontological knowledge remained fragmentary and incidental (Danon 1980:xx).

During the war there were a number of medical advances, and drugs which were developed to improve general health were later found to slow down physiological deterioration. These were used in the treatment of hospitalized elderly (Kennedy 1978:202). This fostered a psychological interest in behavior studies among institutionalized and hospitalized old people, and at the same time, sociologists turned to the study of adjustment among the well elderly. Since many of their subjects were people who had been born in the 1880's and 1890's and were immigrants from rural backgrounds with little formal education, they were finding as much evidence of poor adjustment among the well elderly as psychologists were finding in institutions (Cottrell 1979:13), thus much of the gerontological literature written before and during the 1950's was pessimistic. The 1960's were characterized as a period of political activity designed to bring the needs of older people to public attention (Koller 1968:10). In an attempt to win support for services for ill, poorly housed, disabled, or poverty-stricken old people, emphasis was placed on the characteristics of that minority and views were presented as though that group represented all old people (Cottrell 1979:13). The literature based on the studies of the 1940's, 1950's, and 1960's served to foster and strengthen the stereotypic view that to be old meant to face mental and physical decline and deterioration (Anderson 1960:361), and this added to the very problems such studies were designed to alleviate (Matthews 1979:50). Consequently, a great deal of the literature written during the 1970's was aimed at overcoming the views that were fostered by earlier writings.

By the late 1950's a number of American universities had gerontological faculties, many of which were multidisciplinary research centers which sponsored biomedical, socioeconomic, psychological, and sociological investigations. The sharing of information among disciplines was enhanced with the development of these centers, and the sophisticated conceptualizations of aging as a social scientific issue ran far ahead of empirical research in the 1960's, but the issues identified then are the issues that occupy contemporary social gerontologists. The focus on alternate definitions of aging in different cultural and social settings, personality factors and their influence on adjustment, the necessity of longitudinal research, the limitations of the usefulness of chronological age as a scientific variable, methodological problems in the measurement and interpretation of processual phenomena, and the problems encountered in sampling, testing, and motivating subjects and in analyzing data were all addressed at that time (Maddox & Wiley 1976:3). Today, in fact,

> "......research on aging continues to explore,

> with only partial success, the implications and applications of the sophisticated conceptualization of human aging in print at the beginning of the 1960's" (Maddox & Wiley 1976:9).

Conceptualizations of issues continue to outrun empirical research, and concerns continue to evade solutions, but the main difference between social gerontological knowledge as it existed at the end of the 1960's and as it exists today can be attributed to the fact that contemporary social scientists are less willing to claim universality for their tentative generalizations. They are more fully aware of the mutual influence of older people and their socioeconomic contexts and more ready to view as acceptable the great diversity among the behaviors and life styles of old people. Much of the impetus for this change in view can be attributed to the greater use of the anthropologically inspired interpretive perspective in the social sciences.

It is important to note that the developmental issues under discussion refer primarily to the American situation. Social gerontology developed much later in Canada than it did in the United States. Here, too, however, the major emphasis has been on biological, medical, and psychological phenomena. Studies of senility, depression, personality change, grief reactions, hypertension, doctor-patient relations, and cerebral arteriosclerosis have been conducted at the gerontological unit of the Institute of Psychiatry at McGill University for several decades. As in the United States, biological and psychological research units had been establised at many of the university hospitals across the country (Rosenberg & Grad 1980:51), before the end of the 1940's. In both countries, however, knowledge about the social aspects of aging was much more recently systematized because it was a long time before sociologists recognized the futility of researching social problems without reference to medical and psychological findings. Canadian social gerontology is not nearly as well established as is that of the United States. It was not until 1966, in fact, that a special committee of the Senate of Canada conducted a three year study to examine the social and economic conditions of Canada's older people but the programs that were recommended at that time have been established in only a few areas of the country. There have been few comprehensive Canadian studies on which to base policies, so reliance is placed on the findings from American research. Marshall (1980:2), who deplores this situation, wrote:

> "We cannot.... rely for basic data about the social aspects of aging on research conducted in other societies, because by definition, the social aspects of aging are context-specific. This context is social and historical, and Canada is not demonstrably similar enough to any other society (even that of the United States) to allow direct translation of research findings from other countries into the Canadian context."

Indeed, this is a real problem because American social gerontology is, itself, riddled with controversy. Even though there have been few cross-national studies and very little data has been accumulated about aging in many of the non-industrialized nations, or in the Middle East, Central and South America, Africa, Asia, and the communist countries (Atchley 1972:17), the earlier attempts to generalize about the aging processes were presented as universally applicable. Since a significant portion of all social gerontological research occurs in the United States, the field is heavily biased toward the situations of aged Americans. But because there is a lack of data about the experience of aging among minority and ethnic groups in America, the bias is strengthened by the stress placed on the situations of older Anglo-Americans. Not only does this make American generalizations unreliable as the basis for policy formation in other countries, but it makes it just as unreliable as the basis for policy in different areas of the United States itself.

Trends in Sociol Gerontological Theory-Building

Gerontological research has been dominated by a normative approach. Theories which issued from the early functionalist orientation emphasized the relationship between old age and loss. A lot of stress was placed on trying to find the factors that would lead to success or failure in the transition to later life. The normative and role theories issuing from the functionalist approach were not able to explain any actions, conflicts or changes that seemed at odds with the needs of society, however, and as the need to discuss processual phenomena associated with aging became more apparent, new theoretical approaches were developed. Interpretive theories, because of their affinity with Weber's philosophy, emphasized meaning and personal control. Social exchange theories, based on Marxist reasoning, were used to liken negotiation techniques to the concepts of economic exchange. The proponents of each perspective argued among themselves about whether their theories were normative or not. While some found that only role theories were functionalist and had a normative bias (cf. Dowd 1980:12), others could point out the normative relationship that allowed role, interpretive, and social exchange theories to intersect (cf. Marshall 1980:53 and Maddox & Wiley 1976:18).

Newly applied theoretical approaches did not replace former ones, however, and as role theories and various typologies were used in seeking the determinants and consequences of adjustment, psychologists were pointing out that although behavior is culturally and socially influenced, it cannot be adequately defined in terms of either. The psychological view that aging and old age are integral aspects of the life span made it clear to other social scientists that many of their theories were too simplistic to deal with the complexities of the aging processes. This awareness gave rise to developmental theories and while they took the form of continuity and crisis theories in psychology, stratification theories became dominant in sociology (Gelfand 1982:41). Cohort analysis became an important new methodological technique for sociologists, and although the interest in "adjustment" continued, the emphasis was shifted toward seeking specific solutions to the health and welfare problems of older peoeple.

Interpretive theories were used by anthropologists in participant observation situations and they fostered an interest in network analysis. At the same time, there was a revival of interest in taxonomic and classification methodologies in ecological studies concerning person-environment fit. As with role theories, ecological and environmental theories tended to become elaborate and complex, and since many of them represented an attempt to meld together a number of disparate concepts, some became so elaborate as to appear metaphysical. Ecological theories have made all social scientists increasingly aware of the complex nature of social gerontological theory because they have tried to account for the complexities in the interlocking processes of aging. This has produced a greater concern for multivariate analyses.

Role theories preceded the application of developmental, stratification, and interpretive theories in social gerontology and social exchange and ecological theories have been most recently employed. The influences of earlier theories and their impact on the lives of the old are still apparent but there has not yet been sufficient research conducted to enable theoretical critics to assess the value of the more recently applied theories or to judge their impact on society and on older people. All of the theoretical perspectives are used, to a greater or lesser degree, in all of the social scientific disciplines but the applications differ. In general, sociology is focused on society, and psychology, on the individual, but anthropology represents an attempt to combine both focuses in an attempt to gain a more dynamic view in seeking patterns in human behavior. Because psychological anthropology developed from an amalgamation of psychological, psychoanalytic, and anthropological concepts, many of the anthropological interpretations of gerontological concerns tend to be in greater agreement with those of psychology and social psychology than with those of sociology.

CHAPTER FIVE

THEORY IN SOCIAL GERONTOLOGY

The earliest social gerontological theories tended to depict old people as victims, either of the social system or their own physical and psychological decline and their nearness to death. This was partly because of the nature of the existing sociological and psychological theories that were adapted for the study of aging. Anthropological input into gerontology consisted mainly of "etic" studies which tended to reinforce the idea that old people were victims. There has been a great deal of disagreement about what has been termed "the victims approach", and although the tendency for pessimism is less noted in current theorizing, it has, by no means, disappeared. Contemporary theorists vary widely with respect to the degree of descrepancy they see between human aspirations and biological necessity. They vary also with respect to the amount of emphasis they put on individual freedom and social or cultural determinism. Many believe that older people lack freedom to such an extent that they are forced by both the cultural value system and the social structure to accept, passively, their assigned place in society. There is no agreement about what creates the "negative reality" of the old, or if, indeed, there is one (Back 1976:409). Countering those theories that see the tragedy of aging and define old age in terms of loss, are optimistic views in which the elderly are defined as a new leisure class, pioneers in longevity, and role models for future generations in determining possibilities for self fulillment after retirement.

The variance in researcher perspectives has stimulated a great deal of controversy among social gerontologists. Early studies that focused on retirement found it to foster alienation, poor health, poor psychological adjustment, grief, and the loss of personal identity. But these views were questioned in light of the fact that retirement is predictable and can be anticipated. The pros and cons of mandatory, flexible, and voluntary retirement were discussed to the point of redundancy (cf. Jorgenson 1980, Baum 1974, and Best 1980). Theories about the inverse relationship between the number of older people in the population and their negative position in society were countered by theories which proported that their growing numbers enhanced the possibility of their political importance (Talmon 1968:186).

Maddox and Wiley (1976:15) pointed out that the old have maintained basic human rights and opportunities for political participation, most live in private households, their kin relations are much "healthier" than some of the earlier literature suggests, and the majority have both social and economic security. Anthropologists are finding that "successful adaptation" in late life is a rule rather than an exception in most societies. Social scientists are beginning to believe that the old constitute a social problem only because they are defined in that way by dominant forces in society, and that they can be defined as deviant only insofar as social scientists study aging through a functional equilibrium model of social structure (Levin & Levin 1980:41).

Kalish (1981:241) felt that the tendency to concentrate on old age itself predisposed researchers to depict older people in a negative light. He wrote:

> "If we define older people as victime, we will approach them as victims, and expect them to act as victims."

Berman (1975:4), equally opposed to the "victims approach", saw old age as a natural part of life. He wrote:

> "The aged share individually and collectively the same general socioeconomic problems that confront all members and subgroups of society.....The successful solution to the problems of the aged as individuals, and collectively as a sociologic entity, would, in turn, greatly advance the capacity of society to solve problems confronting all age groups and other subdivisions."

An optimistic view of aging need not be utopian. It is true that old people are not exempt from inequality and discrimination, but they are not the only people who have these experiences. The quality of later life is dependent, in part, on the history of the older individual's ability to cope, and on his life style. Anthropologists have pointed out, that social integration and successful adaptation are both probable and possible in complex societies (cf. Clark & Anderson 1967:428).

Sociological Theories of Aging

Most of the earliest sociological theories of aging were adapted role theories or other existing social theories that could be modified to address the problems of older people. The old were likened to a minority group in that they were subjugated by virtue of the ideology of more dominant forces in society which were able to justify, through the work ethic, inequalities in social and economic opportunities. And like minority group members, they thought to have the potential to develop feelings of hypersensitivity, defensiveness and self hatred (cf. Barron 1953:478 and Breen 1960:157). Some theorists believed that segregating the old in specialized housing developments fostered hostility and conflict between different age groups. But there were others who, through the use of subculture theory, stated that negative forces in society forced the old to rely on one another thus enabling them to develop a "group consciousness" and, especially in senior housing projects, their own gossip, humor, customs, and "old age norms" which fostered integration within and segregation from the wider society. It was suggested that these characteristics of older people could lead to collective action, opposition to other age groups in society, and an improvement in their own social position (cf. Rose 1965:19 and Hochschild 1973:9).

Since it was felt that the old faced discontinuities in positions and roles, and that devaluation accompanied transition stages, old age, the "final transition" was deemed to be accompanied by a great deal of "role strain" which negatively affected the self concept to such an extent that it caused a multiplicity of social and health problems (cf. Secord & Backman 1964:493 and Atchley 1972:100). Burgess (1960:21) recounted the changes brought about by industrialization and since he felt that with the breakdown of the extended family situation and the development of social and economic class differentiation the work place became a major source of identity, he believed that retirement created a "roleless role" for older people. A number of theorists suggested that the only solution to the "roleless role" problem brought on by the loss of work roles was through the development of leisure activities that would provide functional roles of value to the old themselves, and to the society as a whole. Rosow (1974:23) proposed a "socialization to old age" theory in which he suggested mechanisms that could be developed to divest the transition to old age of its ambiguity and prevent people from drifting into old age in a "vague and unregulated process". Blau (1973:184) analyzed the causes of anomie among the old through her "role exit theory". Some sociologists amalgamated psychological conceptualizations of the aging processes with conflict analysis and functionalist beliefs. Williams (1960:269), for example, in trying to analyze "successful aging" in his "theory of action" discussed prestige imposed by one's position, one's social class, and one's personal attributes and found that people have developed different abilities to cope with the normative patterns imposed by societal institutions, and it is these coping abilities together with prestige factors that determine the degree of autonomy or dependence a person will have when old. Williams (1960:268) suggested that only "optimal" maintenance of psychological and biological capacities would insure "successful aging". Theories like this which used too many uncontrolled variables and too many concepts from other fields in an attempt to define and explain aging, while at the same time attempting to clear up controversies within a single discipline, succeeded only in complicating and multiplying the problems that already existed.

One of the few attempts to build a purely sociological gerontological theory which is not a conventional role theory, but is functionalist, is Cumming and Henry's disengagement theory published in 1961. The aim of its authors was to present a theory that would counter pessimistic role theories, be free of emotionalism and subjectivity, be historically oriented and universally applicable, and focus on the probability of decreased physical activity and the expectation of death. Briefly stated, the tenets of this theory hold that the process of disengagement is inevitable and is mutually undertaken by the individual and the society. Because older people have less interaction with others and because interaction reaffirms norms and its lack increases the possibility of eccentric behavior which further limits interaction, disengagement becomes a circular and self perpetuating process. Aging is successful only if the older person undergoes an ego change that will permit him to practice the art of "passive mastery" which entails pride in what has been rather than pride in present accomplishments and present production. Disengagement begins when one becomes aware of the shortness of time remaining and it is completed for men upon retirement and for women upon attaining widowhood. The relationship roles of older people shift to become more peer oriented, horizontal, and egalitarian and the expectation of physical disability and death become easier to handle. Cummings and Henry defined disengagement as being a culture free concept but they explained that the form it would take in any society would always be culture bound.

Disengagement theory sparked a number of controversies and criticisms. A generalized theoretical stance which arose as an attack against disengagement theory suggested that many old people have vigorous and active lives free of physical deterioration and are able to maintain middle age activity levels and high morale into very old age (Dowd 1975:584). Called "activity theory", it held that there was greater evidence of equilibrium than of disengagement between the society and the older individual (Atchley 1972:35).

The tendency to compare the attributes and circumstances of different age groups in complex societies led to an interest in life cycle studies. Because the term "generation" was used in sociological studies to distinguish old from young and parents from children as well as to define different life styles as in the beat generation, the hippie generation, and the baby boom generation, it presented problems in differentiating among age groups, so the term "cohort" was adopted from demography (Cain 1967:60). A cohort usually refers to five year spans in gerontological usage (Dowd 1980:31). It is defined as consisting of all of the people born at approximately the same time who pass through the life course together and experience historical events and social change at about the same chronological age, and the kinds of changes which occur together with their impact on individuals serves to differentiate between cohorts with respect to broad classes of behavior (Maddox & Wiley 1976:19). Theorists contrasted birth cohorts with respect to the impressions, influences, occupational opportunities, mobility patterns, and educational needs and expectations occasioned by the world wars and their aftermath; the trends toward greater female participation in the labor force and engagement in more mentally taxing rather than physically strenuous work characteristic of the present elderly; the result of value changes concerning divorce, sexual mores, family life styles, and kinship solidarity; and the birth rate of various cohorts and its effects on educational and occupational opportunities (cf. Cain 1967; Pampel 1981; and Denton & Spencer 1980). Cohort analysis was used in stratification theories that examined "structured social inequality" and its negative effects on older people; chronological age as the basis for normative expectations for role performance and the allocation of resources; ageism from younger people who resent the old for reminding them of the inevitability of death; and discrimination against the unproductive old in a society that ranks people in terms of occupation and productivity (cf. Tindale & Marshall 1980:44; Riley 1972; Strieb 1976:162; and Gelfand 1982:85). Neugarten developed an age-appropriate behavior theory in which she purported that people's lives are regulated by time tables that define the right and proper times for engaging in life's major events, and stated that stresses which upset the rythms of people's lives produce social maladjustment, mental problems, and difficulties in old age (see Neugarten & Hagestad 1976:51 and Neugarten 1972).

Social exchange theorists discussed social behavior in terms of costs and rewards, balanced relationships, and power. The old who have little to offer but compliance are placed in unbalanced relationships in which imbalance becomes institutionalized and provides a normative basis for inequality (Dowd 1980:55). Compliance leads in time to loss of self esteem and self respect and eventually the costs of compliance are so high that disengagement is the only alternative left. Imbalance rather than mutuality defines the concept of disengagement for social exchange theorists (see Dowd 1975:592 and Dowd 1980).

Ecological and environmental theories were developed to counter other theories that seemed too simplistic and limiting to explain the complexities of aging. Theorists outlined the personal, interpersonal, physical, social, behavioral, and supra-personal components of the environments of older people, including a variety of attributes and items ranging from physical capacity and perceptual skills, significant and less significant others, behavioral expectations, to furniture arrangements, temperature, and availability of transportation, for instance, all of which were said to be arranged in a complex hierarchy within the social and cultural milieu of the wider environment (see Newcomer, 1973:80 re Lawton). Such models were used to examine the relationship between living accommodations and morale and the significance of individuals' past experiences. Sociologists had been finding higher morale among residents of old-age communities and among the old residing in affluent hotels and apartment buildings than among the poor, the institutionalized, and SRO (single room occupancy) hotel residents, but environmental and ecological theorists were pointing out the importance of looking at the factors other than economic which precipitated the choice of accommodation (Neysmith 1980:281). They stressed the importance to morale of social class, the degree of desire for social and family support, and the perceptions that older people have about the quality of their relationships and living arrangements. Some theorists looked at the past experiences and personal orientations of the old, the intensities of their social contacts and their belief in their own abilities to manipulate and control their environments and discussed adjustment in terms of the fulfillment of the needs for personal and private space, the perceptions of the old and the methods that they use to preserve personal identity (cf. Newcomer 1973). Environmental and ecological theories represent an attempt to distinguish parts of a whole for minute examination and then drawing the information together to produce a detailed, yet holistic, overview of the whole (Maddox & Wiley 1976:7). The parts are classified in terms of their contributions to the whole which is the structure within which individuals act, react, and interact in changing environments. While many of the earliest sociological theories were impressionistic and philosophical discussions, and later ones reflected an attempt to emphasize experimentation and empiricism in an effort to get away from both taxonomic classification and philosophizing, ecological and environmental theories re-established the need for classification (Anderson 1960:2).

Anthropological Modernization Theories

The first holistic comparative study was attempted by Leo Simmons in 1945. He used the HRAF, ethnographies, missionary accounts, and historians' reports for relevant information for his discussion about the status and treatment of the old in seventy-two widely dispersed societies around the world. Simmons (1945:passim) stated that food distribution, an adjustment to scarcity rather than plenty, seemed to favor the elderly because of the lifting of food taboos. But with increased cultural and technological complexity, distribution was regulated by factors other than need, and older people with wealth, power, and special abilities were able to receive more food, gifts and prestige than their more poorly endowed contemporaries. The status of the old, as did their treatment, varied among cultures but in many, deference was based on the perception of the old being close to the dieties. Most cultures provided ways for the old to maintain prestige since they were depended upon for child care, camp chores, religious roles, and supervisory duties. Nevertheless, those who became physically or mentally disabled, very old, frail, or senile were often neglected and even abused. In many societies, since it was believed that an old person's ghost could bring suffering and harm to the living, abuse toward old people was minimal. Violence against an old person was usually instigated by fears of witchcraft. In general, prestige was granted in the prime of old age and denied to the very decrepit, but individual initiative, sex, special talents and abilities, favorable social conditions, and cultural factors were influential in determining which of the healthy were given prestige, for seldom, anywhere, has it been granted on the basis of age alone.

Simmons believed that social organization was an important element in security even though kinship responsibilities and generalized reciprocity were culture values in all preliterate societies, and that sex was an important status determinent. He found that female status was highest in matriarchal societies, but cultural factors frequently placed old women in a relatively disadvantaged position. He wrote (1945:81):

> "Wherever aged women have been respected, old men have rarely been without honor; but prestige for aged men has offered no assurance of the same status for women. If either sex has lost respect in old age, it has been more likely to be the woman that the man."

The gist of Simmons' work was that prestige was lowered with increased cultural complexity. With the developement of organized warfare, laws, restricted councils, judicial powers, and a more stable agricultural economy, patriarchal family organization became a general rule, and there was a loss of status for all older people, with the greatest loss experienced by old women. When political power was vested in a centralized authority and hereditary classes and castes arose, they were accompanied by the development of an organized priesthood, permanent residences, and a more constant food supply, the status of women was lowered further. Simmons wrote that the institutions of property ownership, slavery, trade, debt relations, and surplus played down the importance of generalized reciprocity because the distribution of food and other necessities was handled through a system of organized charity, but kinship reciprocity and extended family care remained important since the old with families were better off than were those without.

Simmons' thesis, that the status of the elderly is lowered with increased cultural complexity, has been cited in many studies, but it was presented in theory form by Cowgill and Holmes (1972) who believed that more knowledge of aging could be gained through the comparison of preliterate and highly complex societies. The tenets of their modernity theory are that the status of the aged appears highest when they are few in number but declines when their numbers increase and they comprise a larger portion of the society, it declines as the rate of social change increases, and it declines with greater vertical and horizontal mobility, all of which are characteristic of industrialized societies.

A prolific number of studies by sociologists and other anthropologists were based on modernity theories. In those that contrasted preindustrial and industrialized societies, it was held that preindustrialized societies had family oriented economic organization, an integrative group orientation, kinship reciprocity responsibilities that cut across age lines, a flexible division of labor based on the capacities and availability of laborers, and recruitment of people into various positions through ascription, all of which facilitated direct contact between the old and the young and fostered respect for old people because they were the bearers of tradition (Barron 1961:28 and Talmon 1968:186). Industrialization brought urbanization, technological development, automation, high productivity, elimination of illiteracy, a rise in the standard of living (Dowd 1980:67), and the segregation of religious, work, and family roles. Older people faced a loose and scattered network of services because of altered family roles and emphasis on the independence of the nuclear family. Recruitment to various positions was based on competition and proof of competence, work routines were standardized and defined by bureaucratic organization, there was a shift from the control of property to the control of the means of production, and specialized knowledge became much more important than traditional knowledge (Talmon 1968:186). With the rise of materialism, changes in life styles, expanding populations, mass education, new thought patterns, and the impact of the mass media, individuals and societies changed their goals. Segmentalization of various spheres of life led to the increase of impersonalization in relationships, and this fostered cultural contradictions which necessitated the unlearning of previous orientations and created schisms that threatened and alienated the old (Hochschild 1976:243). Such "facts" were cited time and again in studies concerning the problems of status loss and its association with retirement, adjustment, ageism, and cultural value change.

Post-modernization theories hold that when modern societies mature, the rate of change slows, educational differences between the young and the old decrease, and the status of older people rises (Maddox & Wiley 1976:10) because they have better housing, increased income, the opportunity for voluntary retirement, and choice in the selection of living arrangements and life styles (Pampel 1981:198). Post industrialized societies are characterized by technologies based on theoretical rather than applied knowledge, an economy oriented toward services rather than the production of goods, a stratification system based on the importance of professions, and a greater stress on recreational and leisure time activities aimed at self fulfillment (Pampel 1981:11). One form of post modernization theory explains that the rise in the status of today's old people stems from their changed charactersitics. It holds that because they were raised during a time of rapid social change which altered family roles, functions, and values, they are more resourceful and independent, and, therefore, better able to find satisfying psychological and emotional substitutes for lost work roles. Another view holds that the rise in status has resulted because changes in the social structure have allowed better treatment of the old. In this view, post industrialization has created an atmosphere for the developemnt of public interest groups, and since many of these support the elderly, policies for betterment of their lives are based on correcting their lack of social opportunities rather than on helping them because of their physical and psychological disabilities (Pampel 1981:12), but these views, though separate, need not be seen as mutually exclusive.

A number of anthroplogists studied the status of the old in terms of the cultural values of their societies. Cowgill (1972:243) defined the value system of America as arising from the Judeo-Christian backgrounds of most of the immigrants. Because they had strongly internalized the Protestant work ethic, they valued frugality, self sufficiency, and individual effort. They viewed failure as a sign of moral weakness and saw leisure time as condusive to sloth and temptation. But because they had come from different cultural backgrounds, they had differing norms and expectations for role behavior and this caused the American value system to be less standardized than the value systems of traditional cultures. The old were associated with uselessness and dependenccy because they had to rely on government pensions, medical personnel, and special service programs. Medical advances had made death a certainty only for the old. Because of their lack of productive worth, their difficulties with self maintenance, and their nearness to death, old people were devalued and suffered from ageism. Clark and Anderson (1967:430) wrote that cultural values define the ideals of what "ought" to be manifest by social behavior but situational events and circumstances influence behavior so it can be at odds with the values. Older people in traditional societies were thought to be able to fit into society better than the old of industrialized countries because of of the deeply ingrained group orientated belief systems. Industrial societies were characterized as being youth oriented and having the cultural values of freedom, rationalism, and optimism. Clark and Anderson (1967:430) felt that people of any age had difficulties in attaining personal goals that would reflect some measure of adherence to the rigid cultural standards, and this presupposed greater difficulties in old age.

Anthropologists who have looked at the cultural values with respect to post-modernization have indicated that there is, currently, a gradual shift from individualism to greater interpersonal responsibilities. Social programs, pension systems, medical plans, and opportunities for education for older people receive more support (Huyck 1974:23). Work is no longer seen as an end in itself, but as a means to an end with the consequence that leisure time and recreational facilities are viewed with greater respect. Intergenerational family relationships are said to improve because social service agencies lift the burden of care from adult children, and the old have freedom to create new patterns of behavior (Tibbitts 1960:17). As the society becomes less oriented to productivity and becomes oriented to consumerism and services, the demands for materialistic gratification and sensual pleasures escalate. The stress on recreational activity, on attractiveness, and the denial of death that accompanies the shift in orientation, however, places the old in an ambiguous position and the trend toward their social acceptance is countered by the trend toward continued social rejection.

Social exchange theorists vary as to where the put the "blame" for ageism. Some feel that agricultural societies provided the highest satus for the old because of their control of access to land and other resources, but with industrialization and urbanization when the relevance of land control was diminshed ageism flourished and became institutionalized in the form of tolerance for mandatory retirement, sub-standard housing and nursing homes, inadequate income, and age segregation (Levin & Levin 1980:73). Others felt that with the development of pension systems, better health care facilities, and better housing that were instituted in the early phases of industrialization, the status of the elderly rose (Pampel 1981:5). Still others analyze the status of the old in terms of the shift from early competitive capitalism to monopolistic capitalism, finding that ageism flourished because rational industrialization was accompanied by the organization of large bureaucracies which devalued traditional knowledge and religious faith (Dowd 1980:69). The basis of social exchange modernization theories is the belief that the old are devalued because of their weakened ability to maintain viable exchange relationships.

Psychological Theories of Aging

Because of the problems associataed with what psychologists termed "status striving", old age was characterized as a period of frustration, disintegration, intergenerational conflict, and the possible loss of personal dignity. Some psychologists agreed with sociologists who felt that if the old banded together they could form an effective political bloc and agitate for programs that would better their personal and social conditions.

Pychologists used social exchange theories to analyze friendships among older people and the methods that they develop to cope with discrimination from other age groups. Some stated that friendships are formed among older people who need only acquiese to more powerful groups when the situation demands it, and therefore, the mutual dependency which is increased among group members serves to foster congruence within even though prejudice and discrimination from outside are present (Secord & Backman 1964:423).

A number of psychologists theorized that people tend, always, toward congruency and operate in all unstructured situations to try and bring it about. Retirement lessens self esteem because it removes the older person from work roles which provide feelings of pride, usefulness, competence, and self sufficiency, and in doing so, it threatens the validation of the self. But in striving for equilibrium, an older person tends to modify behavior and to adapt to changes in situations and circumstances through interaction with other old people (Secord & Backman 1964:598)

Some social structural theorists analyze group behavior from a life cycle perspective and in stating that a person is a member of many groups throughout life, they show that people learn to cope in different situations, and because status is always multidimensional, they have been able to develop meaningful coping methods long before they reach old age (cf.Kaplan 1960:425).

Psychological continuity theories of aging are developmental since they relate to the tendency among older people to maintain continuity of the habits, preferences, coping behaviors, personality structures, ideals, and personal commitments that have been evolving constantly through their life times. The life cycle is seen as a multidimensional process of continual adaptation. Though there are many differences among the things that impact on individuals and among their influences on individuals, there are many possible reactions in old age, but because there is change throughout life which occurs within continuity, old people continue to experience change within continuity (Atchley 1972:36).

Some psychologists analyzed the effects of retirement, widowhood, and declines in health and stated that because losses and changes come close together in old age, a great deal of dissonance is created. Personality factors and coping mechanisms were said to determine reactions to dissonance. While some old people act with maturity and realism, others overcompensate, some to the point of pathology. Simon (1973:19) listed dependence, hypochondria, anger, rationalization, illness, depression, and even senility as possible reactions to dissonant situations in old age.

Gerontological theorists discussed "the mid-life crisis", the empty nest syndrome, menopause, expectations of death, and the tendency to dwell on and reinterpret the past as crises points that were necessary parts of aging (Perun & Del Vento Bielby 1979:281). But because they could alter one's sense of timing, threaten self identity, and produce physical and mental health problems, crises that are not satisfactorily resolved could have severe consequences in later life (Perun & Del Vento Bielby 1979:284). Some psychologists believed that North American cultural values which stress the allure of youthfulness create crises for people when they find their first grey hairs or their first wrinkles (Holcomb 1975:235).

The mid-life crisis theory holds that people must come to terms with the distortions they have carried since early socialization, and to do so they must pass through rage, despair, and depression, then into anger at the expectation of death, and finally, acceptance (Perun & Del Vento Bielby 1979:282). Another version defines the mid-life crisis period as a time of evaluation and a seeking for meaning in existence (Marshall 1980:89) This is followed by another crisis period in later life when people are concerned with the integrity of their own lives. A final identity crisis is assumed to come to people late in life, perhaps during their eighties, when they attempt to accept both their lives as a whole and the inevitability of their deaths. At each period, it is suggested, the crisis must be resolved in order to avoid despair (Marshall 1980:87).

Social psychologists have accounted for the introversion, self absorption, and self preoccupation that were seen as characteristic of old people in a number of ways. Earlier theories had found role changes and loss to be the cause of introversion, and because it was seen as a natural characteristic of the old, passive acceptance was defined as adaptation (Dibner 1975:81). The life review theory was designed to account for poor adaptation to aging. Studies showed that people tended to become either more emotionally satisfied or more neurotic with age following the "turning point of maturity" which was said to occur in the late fifties or early sixties (Havighurst 1960:144). Some psychologists found that men became more introverted and "feminine" with age while women were said to become more aggressive and socially active, a phenomenon they called "the blurring of the sex roles". It was defined as being caused by the fact that social expectations change more for men than for women in old age. The tendencies to become more conservative, to avoid change, to become less tolerant of ambiguities, and to take fewer risks were thought to characterize all old people and these characteristics were defined as indicative of introversion (Dibner 1975:83). But at the same time, various kinds of antisocial behaviors were identified among "deviant" old people, and they, too, were depicted as evidence of introversion.

CHAPTER SIX

DISCUSSION OF SOCIAL GERONTOLOGICAL THEORIES

Most of the sociological theories of aging have depicted age-related problems as being individual adjustment problems because the theories are based on functionalist ideas which are not designed to find flaws in the social system (Dowd 1980:5). The old are shown to be deviants who have reversed the optimal conditions of socialization, and as a group, they are middle-class victims of a rejecting society (Marshall 1980:52 and Dowd 1980:15). They were seen as "doomed" to social failure beacuse they lacked norms and had not been properly socialized to old age. Burgess saw them as having a position with no role, and Rosow saw them as having a tenuous role with no position. Roles are conceptualized as activity but gerontological role theorists emphasized loss and inactivity in association with old age. All role theorists suggested solutions that would ameliorate the circumstances of old people within the institutional arrangements in the society (Maddox 1970:18).

Disengagement theory was designed to show how society's needs to outlive individual members, to maximize productive efficiency and reduce dependence on the members with the highest probability of death, and to transfer power from one generation to the next are met normatively and functionally (Atchley 1972:32). It held that as an old person gradually decreases his orientation to society he becomes increasingly self preoccupied, and with the weakening of societal norms, he can find new freedoms (Atchley 1772:33). The authors stated that disengagement does not mean inactivity, nor is activity the opposite of disenengagement because older people are active in "roles appropriate to the disengaged state". Critics disagreed with the theory and with each other about what was wrong with it, and one of the longest standing controversies in social gerontology was sparked. Researchers equated disengagement with retirement, isolation, adaptation, adjustment, and widowhood, and quibbled about their findings and the differences in usage (Hochschild 1976:68). The theory contains "escape clause explanations" and it does not make clear which aspects of disengagement are constant and universal and which are variable in terms of time and form. Disengagement is presented as though it were a unilinear process, lumping together social, psychological, and physiological phenomena, thus "disengagement" is an umbrella term (Hochschild 1976:57). The theory ignores the meanings of the different kinds of disengagement for the people experiencing it, differences in social classes, and the ways people could be blocked from becoming disengaged. It infers psychological behavior can be ascertained by observing overt behavior. Baum and Baum (1980:20) suggested that misapplication of the theory made it appear more negative than its authors intended. It was designed to be a positive view of aging since it contained the element of volunteerism (Marshall 1980:82). Hochschild (1976:53) wrote:

> "Throughout the sixties there was a plethora of research reports, which criticized or confirmed this or that part of the theory, disassembled the variables, suggested alternative explanations, and tested the theory on different populations."

In 1963, Cumming revised the theory and attempted to account for different reactions to disengagement through the examination of different personality types. Henry's revision, in 1964, modified the earlier model by describing disengagement as a developmental rather than a functional necessity. He defended the universality claim though Cumming ignored it (Atchley 1971:476). Maddox (1970:21) suggested that though the theory was found wanting empirically, it increased theoretical understanding of aging as a process, it raised important methodological issues, and by suggesting new research directions, it turned sociologists away from their total absorption with the social problem aspect of social gerontology. It was, however, introduced at an inopportune time because a dynamic, multidisciplinary, multidimentional view of aging which discussed interaction between individuals and the environment was emerging, and there was a trend away from the former emphasis on chronological age and structural determinism. It was simply too simplistic for the times (Maddox & Wiley 1976:17).

Although activity theory was presented as an attack on disengagement theory, it referred to generalized social behaviors and ignored the psychological aspects of aging, and it, too, was based on the idea of the smooth continuity and equilibrium of society, so it really did not oppose disengagement theory (Tindale & Marshall 1980:43). Nevertheless, a new wave of controversy arose as sociologists became involved in contrasting merits of activity and disengagement as predictive of successful adaptation in late life, and the controversy has occupied a number of them to the present time (Dowd 1975:584). Neither theory was designed to test the "optimal patterns of aging", yet the bulk of research was aimed in that direction (Vatuk 1980:126). The two theories polarized social scientists into opposing camps and there were disagreements about what measures were appropriate, how to interpret data, what the implications were for policy formation, and whether or not there were any implications for social values. In time, most social scientists began to view both theories as simple answers to complex questions, but many of them noted that the controversy was influential in pointing out the need for conducting longitudinal research and for looking at a number of variables in researching behavior.

Structural functionalists began to focus attention on the increased interest that older people have in their inner states, conflict theorists focused on dominant group power in allowing or preventing social integration of older people, and exchange theorists focused on subordination of the old through reduction of resource control, all of them trying to use concepts and ideas that stemmed from disengagement and activity theories or from the thinking of critics of these theories. At the same time, psychologists were starting a new trend with the introduction of developmental theories, and while sociological studies were based on "the psychology of timing", social psychological studies were based on "the psychology of crisis behavior" (Perun & Del Vento Bielby 1979:289). Riley's age stratification theory was useful in pointing out the necessity of using a life span focus to seek processes rather than to continue concentrating on the already old as role theorists did, but it represented age unrealistically in using cohort analysis since there are vast differences in childhood between adjacent cohorts but these tend to decrease over time (Dowd 1980:33). Sociological stratification and life cycle theories tended to be unidirectional, and the stages were presented as occurring universally in sequential fashion. Because the only aspect of aging that has been found to be universal is biological, these theories represented biological reductionism as did role theories (Marshall 1980:85). Many stratification theories imply exclusivity and fail to account for the many old who are activly involved in intergenerational relationships.

Critics of cohort analysis have pointed out that there are differences between cohorts and within cohorts with respect to race, ethnicity, and numbers of people of each sex, and these factors have bearing on the kinds of interaction patterns that develop. They disagree about the significance of age appropriate time tables in complex societies because while some see that age segregation fosters their developemnt and importance, others see a trend toward age irrelevance in many areas of life. There does not seem to be a time table system operating in a society in which older people are university students, and in which many people choose to marry late and have small families when they are in the late thirties or early forties. People are choosing different kinds of life styles, fashions are not limited to specific age groups, and variations in behavior are tolerated for all age groups. Critics have argued that even if formal socialization techniques had been identical for the people of one cohort, informal sanctions would differ and affect people differently. Sex differences in the perception of time and in definitions of the importance of various roles, for example, effect how people view various aspects of aging and can have many differing kinds of intercohort impacts. Age is stressed as a common force, but individuals in one cohort experience different geographical and environmental influences as well as different social and historical impacts (Maddox &

Wiley 1976:16). Cohort analysis is useful for comparing cohorts in terms of health, size, and educational levels, but not for the discussion of psychological phenomena or an older peoples' feelings about death and dying. Historical influences and changes due to normal aging cannot be differentiated with cohort analysis.

As with many life cycle and social structural stratification theories, cohort analysis cuts across class lines but since many of the life chances that an individual has are determined by the amount of rigidity or flexibility of the class into which he was born and effect his degree of access to goods, services, and opportunities, social class factors have to be taken into account in gerontological studies. Theorizing about aging in terms of social class is relatively rare. Social class is usually mentioned only in terms of the necessity of its inclusion in research, or it is listed as an additional barrier to "successful aging".

Social exchange theories were introduced as a non-normative conflict analysis of aging but in their stress on the preference and need for balance and congruence, they reveal a functionalist bias. They, like disengagement theory, represent an attempt at objectivity, and suffer in the same way by ignoring psychological factors and meaning. Sociological theorists saw either that society rejected the old, social necessity made rejection inevitable, or social organization reflected the interests and values of the dominant group and allowed differential access to educational, economic, occupational, and political opportunities and power, but these, in turn, justify and legitimize existing institutional arrangements (Dowd 1980:19 and Maddox

& Wiley 1976:18). Social exchange theories of aging tend to overlook the fact that resources and rewards are unequally distributed among social classes and within social classes, and in terms of sex and occupational level as well as age. In their stress on balance, many exchange theorists cannot account successfully for the formal actions among age groups such as the allocation of pension monies, reduced medical costs to the old, and both subsidized housing and social welfare programs, none of which are reciprocated. While some theorists ascribe these to rewards for past behavior, others see it as a kind of "insurance" for the young who will require similar help when they become old. Perhaps more of a failing in exchange theories is their inability to deal with loving relationships between the old and their adult children and grandchildren in which neither power nor balance are important elements (Maddox & Wiley 1976:18). Psychological exchange theories are designed to study friendship groupings in which common age is an important factor, and even though they refer to individual capabilities, they seldom show that isolation of some old people can be traced to their own negative qualities. There can be imbalance in intergenerational relationships as well, with the "power" on the part of the old, because old people can be demanding and oppressive, they can resent aging and feel ambivalent about their grandparental and other age-related roles. For a number of theorists, the difference in social involvement as displayed by young and old is traced to the fact that young people are willing to take greater risks in order to maximize profits while old people are much more concerned with minimizing costs.

A number of social exchange theorists have claimed that the inspiration for their view stems from a combination of economic theoretical perspectives, psychological concepts, and the anthropological concept of gift exchange which has shown the importance of reciprocity and its implications for all societal relationships. Dowd (1980:99), who stated that norms can be disclaimed by the most powerful and persuasive social actors because they can determine the worth of others in terms of roles, sex, age, and other status characteristics, defined social exchange theory as "rounding out" interaction theories. But anthropologists do not agree that social exchange is related to the concept of gift exchange. They conceptualize exchange as consisting of institutionalized behaviors designed to foster group cohesiveness. Anthropologists have found that both formal and informal norms of reciprocity exist in all societies, in different forms, however, because of the differences in the needs and values of various societies. Malinowski felt that reciprocal duties and privileges provide the framework upon which all social relationships are built. Levi-Strauss suggested that the rationale for reciprocity rested on the need to regulate resource distribution, restrict monopoly, eliminate inequalities, and control pressures that are an inherent part of group living. Man's need for survival necessitated the development of society and since survival rests on access to scarce resources such as food, tools, women, and ceremonial objects, all of which are endowed in simpler societies with symbolic significance, the developemnt of society coincided with the development of all kinds of reciprocities (Voget 1975:599). The intertribal Kula ring which united Papuo-Melanesian Islanders in an exchange of ceremonial valuables is an example of open or generalized reciprocity, while the rules of exchange that operate in moiety and kinship systems and in exogamic marriage regulations represent restricted or closed reciprocity. Both kinds were used in simple societies to foster the development of alliance networks that controlled the acquisition of marriage partners; provided help when needed in subsistence, ceremonial, and warfare activities; and enabled the development of a fictive kin system to effect trading relations (Voget 1975:601). Gift exchange has been shown to have a group enhancement effect irrespective of members' ages while social exchange theories stress conflict and inequality among different age groups in a society, so the relationship is not readily apparent.

Psychological developmental theories have a life span focus, and they account for the differences among old people by stating that there are differences in rates of failure and success in meeting and coping with challenges throughout life. Psychologists have pointed out that every age has its compensations, crises, risks, rewards, and opportunities, and the consequences of aging are not all negative as earlier theories suggested. But in looking at the individual without reference to the social and historical factors that impinge upon people and impact on the aging processes, psychologists are prone to confuse age differences and age changes. People of different ages do differ, but the differences are not all due to age. Developmental theories imply the universality and sequential order of life stages and rest on the assumption that certain human functions have their own developmental paths that emerge without impetus from external stimuli (Tindale 1980;164). Although psychological theories do address the concepts of preparation for death and the awareness of finitude

(Marshall 1980:89), they tend to seek causal factors which are defined in terms of continuity maintenance or crisis resolution. Psychologists who accept psychoanalytic ideas believe that old age problems stem from inadequate socalization techniques, for instance. Though they purport to stress a life span analysis, many psychological theories fail to do this because they tend to lump together all those of working age, differentiating them only in terms of stage of career, child rearing, and community involvement, thereby concentrating, as do role theories, on old age itself. Such theories give the impression that there is no distinct adult behavioral change until approximately age sixty five (Perun & Del Vento Bielby 1979:276). Psychological theories tend to stress continuity, congruence, balance, and identity maintenance because they are individualistic. They are too simplistic in light of the fact that people do incorporate change, live with ambiguities and contradictions, and tolerate conflicting feelings and ideas, and these abilities have never been shown to disappear when people reach old age. "Life review" studies are presented by some psychologists as though the activity is continuous in late life, and by others as though it is a point in time phenomenon. Since much of the psychological research is on institutionalized elderly, and most social psychological research is conducted among residents of senior citizen housing pojects, both kinds are limited in scope. Theories based on the subjective reports of the well elderly, in particular, are frequently biased since more women than men live in senior citizen housing, and most studies are conducted without reference to social class, ethnicity, or sex factors (Carp 1976:262). The main thrust of most psychological theories is on adaptation which is most usually viewed from the framework of the "death of the individual - survival of the species" model (Atchley 1972:36), and are, thus, deemed to be universally applicable. But they do not even relate to the historical and cultural aspects of the lives of just the old who are middle class Anglo-Americans (Marshall 1980:90).

Environmental and ecological theories can be so involved with external concerns that they omit psychological factors and can be accused of being dehumanizing in the same way as are social exchange theories. Or they can fall into subjective reductionism by reliance on informer reports to define life satisfaction and adaptation to aging. Those that attempt to meld normative, interpretive, and psychological ideas become so abstract that they negate their own stress on empiricism. There is no standardized method through which to conceptualize and measure the effects of environmental factors and their impact on old people. There is no agreement about how much import should be put on psychological phenomena and the interaction between individual psychic behavior and environmental stimuli (Maddox & Wiley 1976:16). The old vary substantially with respect to their personal preferences, predispositions, and perceptions all of which color the ways they respond to all of the aspects of their environments. The problems inherent in ecological theories make research and replication very difficult undertakings.

Modernization theories usually focus on the treatment of, and the attitudes toward, older people, but they are terminologically unclear in that they fail to differentiate between "status" and "position", or "prestige" and "deference", and, as in all social gerontological studies, they seldom supply a good working definition of the term "old" (Neugarten & Hagestad 1976:38). Some muddle a behavior (treatment of the old) with an attitude (prestige accorded the old), and most of them fail to determine the differences in what it means to be old in different cultural settings. They frequently rest on the assumption that economic, social and political concerns determine rank allocation and they only give lip service to cultural phenomena. Even if treatment was manifest by the same behavior, the meanings behind it would vary from one culture to another (Holmes 1980:276, Amoss 1981:47 and Glascock & Feinman 1981:15). Simmons' analysis has had frequent citation and his findings have been taken as "givens", but he placed reliance upon a variety of sources, some less valid than others, rather than basing his inferences upon direct observation, thus incorporating a number of biases and perceptions over which he had no control (Cowgill 1972:3). His work provided the basis for a proliferation of philosophical comparisons of different historical periods even though his study has never been replicated and empirical evidence concerning the social and cultural determinants of age status are limited (Maddox & Wiley 1976:10). Anthropologists disagree about the supposed preponderance of matriarchal organization among hunter-gatherers, and while some believe that life in preliterate societies was marked by a constant struggle for survival, others suggest that there existed a relative ease and affluence that alllowed time for the development and elaboration of artistic, religious, and ceremonial pursuits. Because of such conceptual disagreements, modernization theories tend to be merely philosophically opinionated discussions.

A popular assumption is that adjustment to aging was easier in pre-industrialized, rural societies where the old lived in family cohesion and died at home instead of in an impersonal hospital atmosphere as is common today. That farmers could work into very old age if they wished is explained as freedom, but it presupposes that no older person wants to retire, an idea countered by the fairly widespread phenomenon of voluntary retirement. And while rural aged are still deemed by some theorists to get the best "care" because of the perceived cohesive nature of rural communities, medical, counselling, and recreational facilities are much more advanced and available in urban centers. The tendency to romanticize former life styles seems to result from the fact that though contemporary theorists recognize the existence and the differences between "ideal" cultural values and "real" social behavior that operate in modern society, they fail to realize that it operated in the past as well.

Anthropologists have noted that the elderly in many present simple societies are given more respect on ritual occasions than in their everyday lives. The "ideal" of deference and respect might be countered by the "reality" of resentment and non-support (Keith 1982:5). Dependence is not despised in all cultures, nor is it defined in a standardized way as is done in complex society. Although technological levels and cultural values have produced a great variety of social climates in which people have aged, the treatment of the old has not been shown to be determined by cultural complexity. Poor adaptation of older people in complex societies is the exception rather than the rule because they have been imbued with the dominant cultural values and have at least some familiarity with the functioning of their society (Maddox & Wiley 1976:11). Some cultures have been able to provide for harmonious, satisfying life styles while others have offered little chance for reciprocal gratification among an individual's roles and pursuits. Just as tribal societies have not all provided sufficient functions for the old, complex societies have not all invariably failed to do so (Clark & Anderson 1967:3).

Because the perceptions about what is deemed of value in later life vary from one culture to another at the same level of development at any point in historical time, what constituted the norms for old age in preliterate societies is not comparable to the norms that govern the attitudes toward the old in industrialized countries (Nydegger 1981:301). The basic flaw in comparisons of countries at different stages of development is the assumption that developing countries will produce patterns that are similar to those of developed countries. This allows researchers to think that by studying the effects of industrialization on older people they can predict the way the old will fare in societies that are progressing toward a new developmental level, but since cultures differ, the results of industrialization will differ (Pampel 1981:6). Dubos (1981:146) wrote:

> "Anticipating the likely consequences of natural processes and of human activities is quite different from predicting the future. The future cannot be predicted for two different reasons. One is that prediction would require complete knowledge of the past as well as of the present which is impossible. The other is that human beings practically always impose a pattern of their own choice on the natural course of events."

It can readily be appreciated that social gerontology suffers from the same kinds of theoretical difficulties that plague all other social scientific endeavors. There have been very few empirical attempts made to verify or refute social gerontological theories but there is a great plethora of discussions about different theories and in many instances, they are accepted or rejected on the basis of a whim or because of a difference in perspective. Atchley (1971:32) wrote:

> "It seems that a very unproductive aspect of aging research is the energy and time devoted to arguing over which theory represents "the whole truth" instead of concentrating on identifying the areas of life for which the various theories are useful."

Since many of the theories are unfalsifiable, replication attempts are futile. Gerontological theorists are more and more frequently reiterating the need for theories that offer clear criteria for finding counterevidence (Hochschild 1976:59)

An Interpretive View of Social Gerontological Theories

The effects of interaction are viewed through a number of different models. Some interactionist theorists analyze behavior in terms of institutions, social structural phenomena, exchange, conflict, or contract. Old people are defined as developing their own norms through negotiations with one another in the face of negative social evaluations. People are seen to impose their own definitions on situations and to arrive at order through negotiation and compromise. Negotiations need not be conflict free, and common definitions are constantly re-negotiated so there are both shared meanings and change. As do people of all ages, the old present the identities in given situations that are demanded by the boundaries and constraints of those situations, the identities being arrived at through negotiation, compromise, and identification with peers (Marshall 1980:53). Their negotiating abilities and techniques are the basis for the quality of their friendships and family relationships, and determine the degree of adjustment and mental health they attain in old age.

Some theorists analyze interactions in terms of personality factors, coping mechanisms, socialization, and cultural values. Older people are thought to use their negotiating techniques, which have been developed through time and experience, in daily interaction which defines their life styles. Past circumstances, personality factors, current moods, physical health status, mental and psychological well being, past coping methods, and past experiences, in combination, underlie and guide their interacting behaviors. The "sum" of the individual, not social norms, is what makes one old person a complainer, another a recluse, a third efficient, and a fourth an organizer and leader. Whether an old person is alienated, disgruntled, well adjusted, happy, self pitying, active, or withdrawn is determined by the style of his life. Many interaction theorists believe that all behaviors, unless they are completely pathological, represent attempts to cope with the perceived "realities" of specific situations of life, and that the treatment an older person receives from others together with his own negotiating abilities are what facilitate or complicate his ability to adapt to change. Bengston (1980:65) stated that continuity within change is dependent upon an individual's history of adaptation which is continually shaped in interpersonal and social contexts. Continual negotiation occurs against a background of cultural and social values, family traditions and family changes, socioeconomic factors, social class status, and the family's place in the broad social system.

Bengston wrote:

> "Normal aging involves the negotiation of continual alterations: in the individual's own body, self, and roles; in their interpersonal network; and in the broader society and culture."

Regardless of the particular model that is utilized, all interaction theorists claim that people attain a sense of order, assess the value of various situations and interactions, and define their worlds through negotiation. In the interactionist view, older peoeple are seen to have much greater freedom of choice than earlier social gerontological theories suggested. Interactionist conflict theorists do not see the old as "victims" either, for they believe that there are structural constraints in all situations and for all age groups. They believe that older people who deviate by acting aggressive, apologetic, or withdrawn, for instance, are doing so, not because of age, but because there are "ideal" and "real" aspects to expectations for behavior that are difficult to live up to and that cause all people to seem deviant to others in some way or another at any age (Posner 1980:81).

Critics of interpretive theories find them limited because they are focused on situations, individual transactions, and contemporaneous relationships (Back 1976:413). They are said to be individualistic and to underestimate the roles of social and cultural phenomena, and are, therefore, not useful in discussing illness, mental pathologies, dependency, and death. Some crisis theories focus on extreme types of behavior, and when they are linked with interpretive theories in an effort to deal with the criticisms, the resulting amalgamated theories become very complex, difficult to research, measure, and analyze (Atchley 1972:36), and next to impossible to replicate. Although there are problems with interpretive theories, they represent attempts to arrive at generalizations about processual phenomema and they are, thus, more dynamic than static analyses. Anthropologists who utilize an interpretive approach tend to view old age as a part of the total life span and this renders their theories an optimistic character that is lacking in many other approaches used in social gerontology.

Anthropological role theorists hold that every society has a structure in terms of work roles, spatial arrangements, means of control, types of interaction, and so on, and that sex and age are important in all of them with respect to placement. The social structure provides contexts within which people interact. People form both their formal and informal institutions through social interaction, some of which continue to exist despite the passage of different individuals and different generations through them (Dimen-Schein 1977:15). Some institutions become very powerful, are reified and idealized, and form the basis for the development of ideologies. But in all situations, and in all contexts, people define appropriate behavior and re-negotiate meanings on a continual basis in keeping with the structural constraints and freedoms that are associated with various settings. In a reaction against the unidimensional and static aspect of most role theories, Goffman (1961:143) wrote:

> "Much role analysis seems to assume that once one has selected a category of person and the context or sphere of life in which one wants to consider him, there will then be some main role that will fully dominate his activity. Perhaps there are times when an individual does march up and down like a wooden soldier, tightly rolled up in a particular role. It is true that here and there we can pounce on a moment when an individual sits fully astride a single role, head erect, eyes front, but the next moment the picture is shattered

> into many pieces and the individual divides into different persons holding the ties of different spheres of life by his hands, by his teeth, and by his grimaces. When seen up close, the individual, bringing together in various ways all the connections that he has in life, becomes a blur."

Because negotiatons are produced and guided by a combination of personal, interpersonal, and environmental factors, each interaction has unique aspects, role enactment is continuously changing and it differs with each individual. Each aspect of a person's life is a status which defines the rights, obligations, desires, and expectations of the one who fills it relative to other statuses in the social structure. People have multiple and interconnected statuses with others in many areas of life and these can cause conflicts and role strain within and among people (Dimen-Schein 1977:101). Interpretive theories acknowledge the conflicts and discords that occur among individuals, among institutions, among statuses, and among roles. Symbolic structuralism differs from functionalism in that it recognizes conflict and change and provides a processual rather than a static analysis of behavior. Because old people are viewed as involved with interaction and negotiation in the same manner as are people of all ages, they are not analyzed pessimistically. Conformity is seen as much less rigid and massive than normative or conventional role theories suggest (Marshall 1980:53).

People cannot completely objectify their own culture systems because all individuals have subjective cognitive elements that they are not aware of possessing. Furthermore, no single individual ever knows or understands all aspects of his own culture system. There is a tendency among anthropologists to treat culture, society, and the individual as though they were separate and objective "things", and this hides the interconnectedness among them and the controls they exert upon one another. Boundaries on behavior, societies, and cultures are not rigidly set, and since they can change, reification of them makes them static "objects" and this does not serve to define them (Dimen-Shein 1977:11). Individuals are not reducible to psychology or to society, because even though they are shaped by social life, they are spiritually, emotionally, and intellectually different and unique. Two phenomena, the sociocultural and the individual, operate together and one cannot be taken for the other (Dimen-Schein 1977:7).

Most social gerontological theories are basically descriptions. Often they are presented as attempted explanations designed to seek the possibility of regularities, and repetition of these regularities, with a view to establishing general laws governing human behavior. But because of the need for the justification of theoretical ideas, there is always the tendency of reductionism that must be checked. Most contemporary research considers more variables than earlier studies did, and this has brought about a firm realization that knowledge about the complex nature of aging and its meanings is really quite limited. As new theoretical approaches are attempted, and new ideas tested, social scientists are more consistently aware that reductionism produces analyses that are far too simplistic for so complex an issue.

CHAPTER SEVEN

CRITICAL ISSUES IN SOCIAL GERONTOLOGICAL RESEARCH

Every culture provides an ideology which defines the ideals and values that limit and guide behavior and influence the way cognitive and psychological organization develop. People have different experiences and have to cope with different circumstances, so each person develops his own view of reality. Bits of peoples' realities overlap to produce common realities which are defined by social scientists as "shared meanings". No one individual, as a member of a specific culture, can understand all of the aspects of any specific shared meaning because the people who share a meaning bring to it their own special views of reality. It is not surprising, then, that social scientists encounter great difficulty in analyzing social behaviors. They observe behavior and attach meanings to it, yet even if behaviors are identical, the motivations and intentions which underlie them need not be the same. Social scientists talk about "shared meanings" when they think they know the intentions, and they talk about "facts" which they define as knowledge based on shared meanings. This, for them, is objective reality.

A cultural ideology is a complex pattern of attitudes, ideas and beliefs, all of which contain inconsistencies and dichotomies, but the culture provides mechanisms through which such phenomena can be made to appear consistent. Among Western cultures these mechanisms include the cognitive ability to think in linear terms such that things are seen to have beginnings and endings; to compartmentalize and arrange things so that dichotomies can be kept in different cognitive spheres; and to polarize ideas (life/death, young/old, positive/negative) and use these dichotomies to compare and rank things. These mechanisms are utilized by social scientists as well as laymen because they, too, are products of their cultural milieu. This, of course, gets in the way of perspectual agreement with respect to any single phenomenon studied, but it is even more problematic when the subjects under observation are from a cultural group other than that of the scientist analyzing behavior phenomena.

Industrialization, capitalism, materialism, and Protestantism with its work ethic and stress on individualism, increased the complexity of the cultural value system in America. The social distance between people was widened causing clashes among various value orientations. Means were developed through which social inequalities could more easily be rationalized, legitimatized and reinforced. Because there are different religious philosophies, political and economic institutions, social classes and ethnic groups in the society, each with its own goals and ideologies, there are many differing views of reality. It is only in the simplest of societies, then, that one dominant and overriding cultural value orientation exists. It is because of the conflict among competing ideologies within a complex society that social change is continuous and often rapid. This makes both the analyses of social phenomena as they effect the older members of society and predictions about aging in the future very difficult

There is a strong research orientation in the American social sciences but a lack of sound gerontological theory to guide research. The tendency to adapt existing theories and to amalgamate ideas into new theoretical stances creates controversies, but at the same time, it fosters the tendency to take certain concepts and ideas as "givens" without heed to the conceptual problems in the fields from which the concepts and ideas come. Research in social gerontology is cumulative but verification of its findings is very limited. The "borrowing" and amalgamating of ideas and concepts among the social sciences gives rise to controversy, as has been shown, but though there are problems associated with using concepts from the statistical sciences, they are more apt to be accepted without controversy.

Statistics in Gerontological Research

Economics, statistics, and demography were among the earliest of the social fields to take a scientific interest in aging. Research findings from these fields have been most readily accepted by other social scientific disciplines because the measurement techniques and the methodologies they employ are deemed to be empirical, and the analyses they produce are seen as objective facts. It is necessary, of course, to know the position of the aged in the population structure, the relative proportion by age and sex to other groups, and factors such as decreasing fertility and increased life expectancy, immigration and emigration rates, and the kinds of social problems which are brought about by aging in individuals and in the population itself, because without such knowledge, there would be little basis for the formation of policies concerning employment, retirement, housing needs, health care, and income maintenance. There is an increase in the size of the older population and a shift in their proportion relative to the proportions of other age groups in each of the developed countries but the factors which caused these phenomena as well as the capacities of different economies to sustain their changing populations differ quite substantially. Population projections are based on census data and assumptions about the birth rate and life expectancy. Predictions about the numbers and age-sex distributions of the populations of each country are based on a number of models utilizing various projected trends in rates of birth, immigration, and so on, yet demographic and statistical data are cited authoritatively in comparative analyses concerning different countries or different regions within a single country.

Economists study the effects of income differences among older people and between older and younger people in the population, the pros and cons of mandatory retirement in terms of the economy, the costs of economic and health care dependency, and changes in the standards of living among older people (Koller 1968:17). Though their findings are held to be important to sociological studies, economists are not in agreement about their validity. Income statistics are based on different measures, some on the income of cohorts of a particular age group, others by comparing the income levels of different age groups, and still others by the comparison of different time periods with respect to the purchasing power of retirement income. There are inequalities in terms of income on any of these indexes but the gap between "haves" and "have nots" is widest among people over age sixty five. It has been said that the old are disproportionately poor but the wealthy are disproportionately old. In their predictions about the income problems of the old in the future, some economists believe that the retirement of the "baby boom" generation will cause government pension systems to become bankrupt (cf. Allentuck 1977:3 and Baum 1974:235), while others explain, just as convincingly, that this event is highly unlikely (cf. Patterson 1980:14 and Stone & Fletcher 1980).

The dependency ratio, frequently cited in sociological studies, is calculated by adding together the number of people in the population who are below the age of nineteen and over the age of sixty five and comparing the total with the number of people in the twenty to sixty four age bracket. The latter is said to be comprised of the productive members of the population. The "old age dependency ratio" is calculated by comparing the number of people over sixty five to the number in the labor force age bracket. Both measures are defective. The dependency ratio shows a lower number of dependants than does the "old age dependency ratio" because of the decline in the birth rate. Neither measure accounts for the rich among the elderly whose investments add to the total economy of the country, not do they take into consideration the fact that many people of working age are unemployed at any given time, and that these people can, themselves, be classed as dependants. There are a number of sociological studies, utilizing economic and statistical data, which discuss the possibility of older people, especially older widows, falling below the poverty line (cf. Chappell 1980:41 and Ross 1983:24). The "poverty line", however, differs regionally because of the differences in the costs of services and transportation, and the differences in wages and the cost of labor. It differs as well for single and married people. It can be shown, in fact, that there are at least five possible "statistical" poverty lines in both Canada and the United States.

The social sciences that are most involved with aging as a social problem and those that are most closely allied with applied research rely most heavily on data from the statistical sciences because they are most effected by political and economic concerns. The quip "politics is the science of who gets what when and why" concisely depicts a social fact, namely that economic and political factors determine what policies will be implemented, and for whom, while demography determines where they will be located. Applied disciplines and funding agencies do have needs, and problem oriented research is necessary, but without basic sociological, psychological, and anthropological research, the tendency to focus on certain concerns at the expense of equally or more important others would go unchecked.

Research in Social Gerontology

Social scientists who are involved in basic research disagree about whether gerontological studies should be conducted as subfields of different social scientific disciplines or in multidisciplinary research centers where they can be guided by supervisors with specialized training in social gerontology. It has been argued that studies conducted in isolation enhance the possibility of gathering all relevant information from each field. For proponents of this view, multidisciplinary research is hampered by the need for the scholars to reach consensus rather than arrive at "truths". There are those like Bayne (1980:4) who believe that the broad multidisciplinary approach in which several view points are employed weakens research and that it has not been effective in developing methods whereby variables can be measured accurately, nor has it fostered clarity in the formation of basic hypotheses to be tested. On the other hand, those who favor multidisciplinary research claim that the distinctions between disciplines do not disappear but become more fluid and that this facilitates the flow of ideas among them. The belief is that in sharing ideas, social scientists will be much more committed to seeking reliable knowledge rather than to concentrate ~~on~~ the justification of their personal disciplinary concerns and the biases which accompany them. Proponents of multidisciplinary research believe that the potential for generating hypotheses is broadened when several investigators bring their interests to the same context. Carpenter (1981:177) wrote:

> "The need for a holistic approach to the development of gerontological knowledge, including a multidisciplinary view of aging as a process and old age as status, is matched by the necessity for an integration of substantive and theoretical knowledge with programmatic concerns of providers involved in the planning, design, and provisions of services for older people."

Social gerontology has more growth potential among academic specialties than do some of the more traditional social scientific disciplines but it can absorb only a small percentage of those who are trained in the field. Most graduates interested in a career in social gerontology have to go to the applied disciplines, service sector agencies, and various helping professions (Strieb 1981:246). Carpenter (1981:178) examined the trend toward increased interplay between the interests of social scientists and those of service professionals and applied disciplinary personnel. He found it due to several factors which he listed as:

> "a shift from acute to chronic diseases, increased requirements for more than descriptive studies and toward programmatic approaches which impact upon factors; interest in inter and intra-organizational

> dynamics; increased interest in socialization and developmental issues in later life; increasing numbers of older people and the need for scientific skills significant in gerontology; increased emphasis on the need for scientific evaluation of designs; increased career opportunities in applied (but not in academic) fields; increased consumer thrust in area of service delivery; need for more gerontological knowledge concerning increased use of services by older people."

Researchers work with applied disciplines such as geriatric nursing, social welfare, and health administration, as well as with planning agencies in the fields of architecture, recreation and education. Knowledge in both applied and basic fields is developed and refined because of this interplay (Marshall 1980:2). On the one hand, applied research is good because if directly involves the researcher with older people and takes him away from "ivory tower" and "armchair" theorizing. It forces rearchers to continually develop, modify, and refine their hypotheses and methods (Clark & Ruffini 1981:33) and to examine their perspectives, assumptions, and conceptualizations. But on the other hand, it can be problematic because the conditions of a research project can influence the theoretical perspective and force a researcher to generate interpretations based on beliefs and practices traditional to the applied discipline or service profession with which he is working. Quite often there is strong pressure from social agencies and applied disciplines to direct the research to current and narrow problems. A social scientist can lose his overview perspective and focus on the need to rectify social wrongs. By focusing on the needs of the present older population, the necessity of examining sociocultural phenomena and the way age effects the social structure are underestimated (Nydegger 1981:295). Methodological, theoretical, statistical and technical skills, expertise and competence are all in danger of becoming secondary to the practical needs of the service system because political, economic, social, and bureaucratic considerations are highly influential in determining the outcome of a research project (Strieb 1981:245).

Social scientists interested in applied research are frequently forced to orient themselves to the goals and programs of the social agencies and applied disciplines they work with, they have to accept the definition of aging and the elderly that prevail in these disciplines and agencies, and they must concentrate on seeking applicable results. In academic or basic research, social scientists have more autonomy in the selection of problems and they have some latitude in the development and use of methods to meet the boundaries and constraints that are set forth by the research project itself (Strieb 1981:4). Their work is judged by colleagues in their own specialty rather than by outsiders. This could lead to stagnation of ideas and limited emphasis on either replication or the seeking of counterevidence. There is a tendency for the acceptance of particular ideas in social gerontology to rest on the popularity of its source and the academic prestige of its proponents rather than to examine them in the light of their usefulness in helping people to understand and cope with the problems associated with aging.

Both basic and applied research consist of a complex blend of the questions to which an investigator is attempting an answer, the purposes for which the answers are sought, and the choice of methods employed to achieve the purposes and answer the questions (Willems 1967:151). In both kinds of research, more data than can be analyzed is collected because it is seldom known which lines of inquiry will prove to be dead ends. In basic research, establishing the null hypothesis is useful in order to validate generalizations, but in applied research, it is almost useless (Clark & Ruffini 1981:27). The controversy concerning the soundness and validy of either kind of research creates a debate similar to what Willems (1967:140) calls the "laboratory vs natural" debate because differences are seen to rest on the perceptions about how much influence and manipulation an investigator imposes on any given situation. In both of these "debates", the problem of "getting what one looks for" is never satisfactorily resolved. The results of basic research can be refuted or validated by re-analysis of the same situation by another investigator from the same specialty using a different perspective, or by an investigator from another specialty. A controversial and unresolved issue concerns whether basic research findings should be replicated exactly to see if alternative interpretations can be found or whether they should be tested in other settings and the concepts applied to different situations. The results of applied research may be applicable in no other situation since all of the factors impinging on the possible success of any project are not known so they are not reported. Questions of replication are usually of greater interest and concern to the social scientists than to service personnel, and there are other difficulties to contend with. For instance, differences in orientation of service providers and social scientists can serve to slow the interplay between theoretical and applicational aspects of gerontological research. Similarily, the institutional norms governing the service providers and the rules governing the professional behavior of social scientists might influence the speed at which knowledge is disseminated from the academic environment into service delivery systems (Carpenter 1981:177).

Much of the academic research and virtually all of the applied research is aimed at a specific subgroup of older people. It is focused primarily on urban dwellers and oriented largely to the present because of its problem oriented nature. Research which is valid for today's climate may be invalid tomorrow in light of the expected differences between the present elderly and the aged of the future. Though all of these problems and shortcomings are of great concern to social gerontologists since they hamper the development of universally applicable gerontological theory, effective methods by which to mitigate or eradicate them are not available in our present state of knowledge.

Finally, the role of the researcher in an applied discipline or social agency has been receiving attention. Clark and Ruffini (1981:29) described what is becoming a popular view in writing:

> "The role of the researcher, while clearly spelled out and understood by all appropriate agency staff, must retain some flexibility. The researcher must avoid becoming another staff member. Here the anthropological role of friendly stranger may serve as a useful model. It is impossible to work toward a set of program goals as a staff member and at the same time evaluate or study the effort made to achieve those goals. Even if the research concerns a program conducted by the agency, rather than the agency itself, the researcher cannot function effectively as a staff member.....To a certain extent, the researcher should remain an outsider looking at the system from an external vantage point...The researcher should develop a role that allows him to stand outside the normal activities of the program staff while being able to observe

> the dynamics of that program. This is truer for the observational studies of the field researcher than for someone engaged in survey research or interviewing with structured questionnaires. Whatever the research method, the optimal research role is that of a friendly stranger."

Methodological Issues

Social gerontological research is complicated by methodological problems such as those inherent in both participant observation and survey techniques. Survey methods are frequently used to collect attitude statements and employ them to explain inferred behavior and feelings. The responses can be evaluated without reference to the social context which is instrumental in the development of certain attitudes and behaviors. If mail surveys are used, only a portion of the questionnaires are returned and the responses collected represent the biases of a self-selected rather than a randomly selected group. But in interview methods, too, there are difficulties. An investigator can err in assuming that the responses elicited have the same meanings for the respondents as they do for him (Hochschild 1976:84). If survey and interview techniques include the use of open-ended questions, they elicit subjective responses which can be quite impossible to interpret correctly. If they use closed questions which are geared to unqualified yes-no responses, the interpreted data might not represent anyone's reality.

Most research projects employ limited samples and their findings are based on special cases requiring particular methods and particular kinds of solutions. Frequently such findings are refuted after being used in other areas and on cases which differ substantially from the original cases. Often, too, a single research project includes too many variables and attempts are made to relate specific problems to multiple causes. In such cases it is difficult to follow the researcher's thinking and to ascertain why he has chosen to find certain things causal of the social problems he has outlined. Reports that result from such involved research can be both deficient and misleading. The tendency to treat all of the elderly as a homogeneous group, to overstate the affects of age at the expense of socioeconomic background, ethnicity, family relationships, and so on remains quite dominant in social gerontology although there are volumes of criticism addressed to the matter (Gelfand 1982:4). In like manner, the tendency to compare the old to other "problem" groups in the society, such as adolescents or ethnic minorities, prevails, but it adds little, if anything, to gerontological knowledge (Merlin 1965:377).

Social scientists have value oriented biases and they use them to justify their choice of topics (Tindale 1978:165). They decide what signifies adjustment, for instance, and when they do not find these variables, they label the subjects maladjusted. Social scientists choose for dependent variables those things that can be measured and scaled - attitudes, values, dispositions and so on, - but the responses they get are subjective, and older people being aware of the cultural values of the society will give the most "socially acceptable" answers, thus invalidating the research. Survey analyses that use the respondents' own definitions of situations and problems and rely on their perceptions and perspectives are in danger of presenting as public issues those concerns that have been reduced to private troubles. Because of its problem oriented nature, social gerontology has a tendency to concentrate on troubles and this can easily obscure the fact that social issues which effect older people are comprised of many intrelated environmental and personal factors, a large number of which are associated with phenomena other than the aging processes themselves.

Researchers and practitioners who do not have sufficient knowledge about the values, feelings, priorities, and customs of their subjects tend to project their own perceptions onto situations and to assume that they represent the perceptions of the old people they work with. This creates a complex ethical problem. Social scientists evaluate what goes on in society, offer social criticism, identify those social situations that prevent the realization of goals, and suggest remedies. But as a member of a culture with knowledge of the cultural values with respect to what is considered "good", "bad", or "appropriate", a researcher can overlook the fact that he has learned these values within a certain social milieu that has influenced him during his life time. Gerontological researchers are younger than their subjects and have grown up in a different social milieu so they have conceptions about such things as leisure, work, freedom, industriousness, values and morals, for example, that differ from those of their subjects and they can misrepresent the responses given in both survey and interview studies.

The historical era in which one was born and through which one goes through the life stages, race, religious beliefs and practices, social class, educational level, occupational category, and many other social characteristics produce differences among people that can obscure the influences of the aging processes (Atchley 1972:27). Researcher bias and the passage of time which changes any population are variables that enter every social scientific study and are not in the realm of researcher control. Furthermore, immediate social settings and environmental factors impact on a study. Matthews (1979:27) noted the importance of establishing trust to get at the realities of older people and to avoid superficial analyses of "acceptable" rather than "true" perceptions and responses, and she recommended the anthropological methodology of combining long term participant observation and intensive interview techniques to avoid, as far as possible, some of the methodological difficulties that plague social gerontological studies.

Social gerontologists disagree about whether to treat the older part of the population as a group or as individuals. This "lumping and splitting" debate is behind much of the controversy about what kinds of studies can be conducted and what solutions can be deemed feasible. Older people comprise a "statistical group" for purposes of social programs and pension systems and "old age" is seen as a legitimate categorization by planning agencies, governmental bodies, many social scientists, and laymen in general. Categorization is basic to objectivity. It simplifies having to acknowledge variations and it facilitates the planning and implementation of programs, but it is evaluative and it always involves a certain amount of stereotyping (Fry 1980:18). And though it has been effective in drawing public awareness to older people as members of a significant group, it has sharpened the social boundaries between people of different ages. The common belief that with the removal of their problems the old would blend into the mainstream of society has proven to be false. When people have to be "lumped" during the problem solving stage, the stereotypic view that is fostered thereby is not easily eradicated. The main problem with treating the old as a category, however, is that it hides the differences among women, the differences among men, and the differences between the sexes. It also hides the differences among older people that have to do with racial, ethnic and class factors, all of which heavily influence the processes of aging (Cottrell 1974:3). It is not known if older people resent being categorized, or if indeed they are aware of it to the extent suggested by those social scientists who deplore "lumping". In complex societies, people grow used to categorization. Many of the societal institutions are designed to cater to specific age groups but even among those institutions designed to cater to mixed-age groups, studies have shown that people tend toward mixing with others of their own age.

The tendency to rely on cross-sectional research has been a problem in social gerontology for a long time. Cross-sectional studies are inadequate for the study of developmental processes because they seldom show the differences in terms of socioeconomic environments. While researchers readily admit that there are differences in social competencies, opportunities, and attitudes between the young and the old, they often overlook these same differences between people of age sixty-five and those of age seventy-five or eighty-five. Cross-sectional analysis is not the proper methodology for isolating or interperting the contributions made by each of the aging processes to life changes (Maddox 1970:22). Although longitudinal studies on several groups would allow differentiation between influences of social and cultural change and age-related change, they are time consuming and costly and few research centers are equipped to conduct such studies (Atchley 1972:28). Multidisciplinary studies were developed on the assumption that researchers from several disciplines could produce data which, when analyzed together, could isolate behavioral patterns typical of the group studied, but these studies are not longitudinal and the generalizations they produce are not universal because they are not even applicable to other groups within the same culture.

Definitions of terms and concepts and a thorough explanation of methodology and analytic procedures in any research project are vital, yet this is not a common practice in any of the social gerontological disciplines. Thorough and complete reporting would enable social scientists to understand one another better regardless of their preferences for one kind of explanation over another. Bohannan (1981:29) stated that though anthropologists have long recognized the existence of "ideal" cultural norms and "real" social behavior which differs from these norms, they tend to analyze a cultural system in terms of the ideal in order to make generalizations. But seldom do they make this fact clear. When field settings and situations are well described but the processes by which data is gathered, manipulated, and analyzed is less well explained, there are implications for possible replication. Thoroughness and clarity in defining all aspects of a study can either show that what is done in one area might not be suitable for studying another area, or they can facilitate modifications that could be made for studying different settings.

Anthropological research will not radically change existing methods, theories, and concerns in social gerontology because anthropologists must grapple with many of the same kinds of problems that plague other social scientific fields, but it certainly can help to modify perceptions and it can influence policies by putting forth the views of older people, and by making available information concerning aging in different culture systems and among different ethnic groups in complex societies.

Whether research represents true "objectivity" or results in a "true" depiction of society and social issues has been argued in the literature since the beginning of social scientific interest in aging. In light of the problems discussed in this chapter, it can readily be appreciated that it is not an issue that will soon be resolved. The difficulties in theoretical, research, and methodological issues certainly keep the field of social gerontology in a state of turmoil and limit scientific progress. But there are merits in controversy. It is, to a large extent, responsible for preventing narrowness and rigidity in the selection of issues and the approaches employed in studying them. It also provokes new insights and creates an atmosphere in which the possibility of new breakthroughs in knowledge is enhanced.

CHAPTER EIGHT

CRITICAL ISSUES IN POLICY FORMATION

Havighurst (1960:231) identified two culturally inspired and distinctly different philosophical views which have appeared in the social gerontological literature. One is the philosophy of autonomy through which the old are considered to be independent and able to exercise choice and show initiative. The other is the philosophy of passivity in which the old are viewed as unable to care for themselves economically or socially in a society which changes rapidly and becomes increasingly more complex. The autonomy view favors policies which would foster independence and supplement the resources of older people, encourage employment as long as possible, and encourgae active leisure pursuits, home ownership, individual savings, private pension systems, and the development of local community institutions for the aged which would be run by the aged. The passivity view favors policies which recommend state provision of pensions and the development of social welfare services to be administered by medical personnel, social workers, club leaders, housekeepers, and counselors, with the goal of making old age a period of life that is as comfortable and enjoyable as possible. Each of the modernized countries has had to work out its own general policy orientation in keeping with its cultural values and its socioeconomic capabilities. This orientation, in all countries, has had to be focused somewhere between the two philosophical extremes because no individual can be truly autonomous, and yet all individuals would succumb to debilitating dependence if they were governed by rigid policies that covered all of their concerns. At any rate, no one philosophical view can address all of the concerns of older people because their needs vary and they have different ways of coping with their problems and concerns. Maddox and Wiley (1976:5) wrote:

> "The way a society defines its social problems and discusses their solutions, reflects, at least implicitly, a perspective; the perceived nature of a problem affects both the solutions one can imagine to be relevant and the solutions one is likely to pursue."

American policies reflect the cultural values or philosophy concerning how peoples' needs should be met (Benitz 1973:103), but they also reflect the social goals that are considered desirable by various levels of government and by various societal institutions and agencies, since their goals define which programs will be implemented, where, and how (Solomon 1973:96). Any decision about policies and programs will affect other social areas and because they are implemented with reference to political, economic, and social welfare structures, they are difficult to change once they are begun.

Theoretical problems and ambiguities in terms and concepts have bearing on the difficulties inherent in the formation of coherent social policies. Social needs are outlined by researchers with differing interests, and while academic scientists tend to favor theoretical perspectives which aid in seeking generalizations and universals, those who work with applied disciplines, service agencies, and helping professions tend to form generalizations on the basis of studies conducted on small samples which have specific concerns and specific issues. In the first case, the individual is overlooked, and in the second, a small segment of the older population is used as the basis for discussing the problems of all older people. Findings from both kinds of research serve as the basis for policies and programs because practitioners see them as prescriptions for action. But both kinds of generalization can enhance stereotyping and foster the inefficient use of resources. Unless policies are based on accurate and reliable knowledge, they and the programs they inspire can outlast their usefulness. Short range goals may aid in the solution of an immediate problem but they do not help to change the status of the aged in society as long range goals might. Few policies are formulated to include both short and long range goals, however, but few programs are designed to serve specific purposes of limited duration (Levin & Levin 1980:118). A specific program will not work for all old people, and to complicate matters, people need different kinds of programs for similar kinds of needs (Maddox 1970:25).

Evaluation of policy which has been developed on faulty generalizations may itself be faulty. Certain policies may be found to work because the solutions they provide are "what was looked for", or they may be seen as working because there is a lack of awareness of alternative solutions. The justification of policies which merely make "the best of a bad situation" insures their continuity and serves to allow the implementation of further less-than-perfect policy.

Federal, regional, and local community policies are often based on the findings from survey research. There are various degrees of flexibility at different governemental levels with respect to the implementation of programs (Strieb 1981:252). Often, needs are defined differently at the various gevernmental levels and there is a great deal of difficulty in translating national goals and priorities into concrete programs and services at the local level (Strieb 1981:253). Ideally, regional directors should systematically collect data rather than having it done by several organizations which are attempting to gain support for specific programs, and planning at all governmental levels should be more carefully co-ordinated. It is, however, impossible to collect ideal needs assessments in the "real" world of a large and complex society. Local office staffs vary in their interst, training, value orientations, attention to precise details, and with respect to the incentives and sanctions for getting work done. It has been said that if an organization succeeds in reducing a perceived problem without eliminating it, the organization tends to survive. Self interest prevents a properly conducted needs assessmant because that could divert scarce resources away from certain agencies and organizations. Besides, local office personnel could find the extra work to be governmental "red tape", irrevelant to the meeting of their own goals, unrelated to their day-to-day affairs, and a threat to local autonomy. This creates difficulties for governmental and economic bodies which must assume that resources are being used "rationally". There are differences between the goals set by law and the actual operation of social service organizations. Strieb (1981:254) calls the avoidance of strict adherence to social rules and laws "normative evasion", a wide spread and patterned characteristic he defines as one of the dominant themes in American culture. Thus, too many policies are formulated and too many programs implemented on inadequatae knowledge in a climate aggravated by the constant battle for resources, power, and influence among competing bureaucracies and their need to justify their desires, decisions, actions, and self-protective maneuvers. Neverthelass, agencies are necessary or some older people would get no services at all (Strieb 1981:256).

Most American policies reflect a normative bias since they are concerned with what society ought to do and what individuals ought to do (Cherlin 1981:20). Many seem to be based on the view that the old are helpless, incompetent, and problem ridden and need help to cope with their lives. Such assumptions do not give older people credit for having developed adaptive capacities over time which may appear maladaptive to the assessors but need not be so in reality. Pessimistic views influence other scholars and they also have negative consequences on the morale and self-esteem of older people. Programs designed to help "victims" are moralistic and paternalistic (see Dowd 1980:116 and Tindale 1978:168). There are a number of policies concerning urban renewal, senior citizens' residences, and institutionalization of older needy people, which have been designed to insure better housing, nutrition, and health care and to prevent isolation, but many of these step on the rights of the old who do not want to be moved and who may not feel needy even though they are socially defined as needy.

A number of policies have the objective of integrating the old into the social structure. The term "integration" is controversial since it is used to refer to including old people in mixed age programs as well as to segregating them in programs designed to enhance the interaction among those over age sixty-five. "Integrative" programs may be "ideal" on paper but not helpful in reality because many of them, due to funding concerns, are rigid and fail to offer options which would allow the older person to perceive choices and maintain "the integrity of self" (Solomon 1973:94). Programs are usually defined as being placed in the areas of greatest need but they could be in areas in which people have made demands because they have become accustomed to having their needs met by social delivery services (Siemaszko 1980:271). It is a fact that rural areas are the least able to provide programs since they lack both specialized and professional facilities. It is a fact, also, that policies seldom relate to ethnic or social class differences and most of them are geared toward white, Anglo, middle class, urban old people (Benitz 1973:106).

Programs for the elderly do not remove the age boundaries but they do encourage more participation. This reflects the popular American culture value that there are merits in association and group mindedness. Low participation is seen as apathy when it may simply indicate that needs are not being met. Few program organizers appear to realize that in demanding participation thay are stressing conformity rather than the utilization of personal resources.

The unresolved problem concerning whether social programs should be designed for all of the aged, or just for the needy, or whether there should be blending for some programs and singling out for others is more than a philosophical issue. Partly because of political and economic concerns, many policies stress the involvement of families, volunteers, and the community. Sometimes they are based on the romanticized notion of community cohesion of pre-industrialized America, but no amount of wishful thinking can make this notion applicable to urban centers and their vastly different social milieu. There is a great diversity and complexity of programs and services for older people with redundancy in some areas and lack in others, in part, because they are so poorly co-ordinated.

Lowy (1975:169) wrote that it is unrealistic to expect a totally comprehensive, co-ordinated, and continuous delivery system to meet all of the needs for all of the services for the elderly so priorities have to be set. The government has neither the resources nor the mandate to do everything that is found to be necessary. Local community agencies and the elderly themselves have to aid in the process. Older people can help by defining their goals since decision making bodies are not all in agreement about goals and priorities and there is insufficient flexibility in mediating activities to allow each area to get the programs it needs. The comments and reports of researchers have both direct and indirect impact on policies, and though most policies attempt efficiency based on economic sensitivity, they should take cultural sensitivity into consideration as well (Siemaszko 1980:271). Anthropologists have found out that the old can and do meet certain needs in each other under various conditions. Anthropological investigations can influence policies to promote these conditions, and in so doing, they can modify the current trend of policy implementation based on insufficient evidence and biased information.

Anthropologists have shown the importance of cultural relativism in the formation of policies. Holmes (1980:276) illustrated this in writing of a well-meaning American based program that failed. Meals-on-wheels, a necessary and popular program in North America was set up in American Samoa but because of difficulties in delivery, the elderly were invited to meet at local schools at meal times. The program failed because not only do adults and children eat separately, but it is considered beneath the dignity of the elderly to accept anything that relates to "charity". In similar fashion, too little is known about the aged of ethnic groups and of working and lower class old people to enable the efficient use of resources in program implementation for them. They have been accused of underuse of available programs. This could stem from poor communication skills, unawareness of programs and services, or the refusal to seek help from agencies. The processes and roles of bureaucracies might have very different meanings in different culture systems and in different social strata. Social agencies are sometimes seen as the last resort and their use as an admission of failure rather than as an enhancement of opportunities for old people and their families. In many cases, many of the governmental policies have been seen as too rigid and impersonal and they might well represent a force with which lower class and ethnic elderly are not prepared to deal.

Social psychological theories brought the importance of psychological phenomena to the study of aging and allowed professionals and practitioners to turn away from their complete absorption in the social aspects of aging. Older people were then seen to have needs for human relationships, mental stimulation, and psychological well being (Bengtson 1973:65). The stress on planning services and programs for the elderly and involving them "for their own good" is lessening and there is greater evidence of programs being designed and run by older people using their own definitions of needs and interests. Some theorists suggest that as older people design more of their own programs and services they will widen their social networks and this would enable them to participate in interactions that could change the social structure and the status of old people (see Dowd 1980:124).

Policy and the Aged of the Future

Social scientists disagree about age salience in the future in complex societies. Some believe that the conflicts between age groups will intensify as the population grows and greater demands are placed on decreased energy resources. Ageism, they suggest, could grow worse as the proportion of older people increases and the costs for social and health care rise (cf. Levin & Levin, 1980 and Loether,1975). Others suggest that a more equitable social system is arising and with it, higher status and greater concern for the well-being of the elderly (see Neugarten & Hagestad 1976:38). Such disagreements make evident some of the difficulties inherent in the formulation and implementation of long range policies.

Sociological studies have shown that the old lag behind the young in terms of income, education, and employment, and that during periods of progress and productivity, the gap widens and the old become increasingly disadvantaged. Neugarten and Hagestad (1976:39) explained that inequalities are greatest between the old and the young in terms of education but that older males are not as disprivileged as are older females with respect to occupation and income. They stressed that there will be different results for the old in the future because more women are in the labor force and in prestigous occupations. People are also more used to social programs and as the "baby boom" generation provides a larger number of older people in the population structure, the impetus for the formation of pressure groups that will be able to make demands and have them met will be enhanced. The old of the future will have experienced more travel, more involvement in national as opposed to merely local concerns, and having been reared during a time of changing family values and functions, they will be more resourceful, more independent, and more able to find satisfying psychological and emotional substitutes for lost work and family roles. The old have always been shown to be recipients of change, but they, too, instigate change, form communities, and belong to political associations that are involved in issues relating to all age groups (Keith 1982:6), and many scholars expect such characteristics to become more pronounced in the future in view of the expectation of a longer and healthier post-retirement period, an increase of four generation families, and other newly emerging social phenomena (Cherin 1981:14).

It is important to note that the tendency to view old age as a period of loss and possible maladaption has been overdone but predictions about the positive connotation of old age in the future are often based on utopian thinking. Much of the future oriented literature is about white, middle class Anglo-Americans and fails to take into account either the future old of ethnic minority groups or of lower and working classes. The necessity of cultural relativism is just as important in making predictions as it is in the discussion of current trends and problems. Another failing of the current literature concerns the prevailing view that the cultural system represents a singular and unified ideological system. There are always competing values in complex cultures, and for every trend that seems apparent, there are countertrends. Though youth is glamorized in the American value system, the young are actually quite powerless in the social structure. Young adults are not provided subsidized housing and medical care as a matter of course, nor do they have cut rates for social functions as the old do. Social welfare programs for young adults have a very different connotation than those designed for the old. People adapt to their cultures by selecting some of the values, and in so doing, they develop priorities and they anticipate a certain amount of change in the social system and in themselves, and as part of this ongoing process, the old are part of the reason there are trends and countertrends in the value system.

Halcomb (1975:246) stated that respect and concern for the old must not be merely verbalized but must result in humane and responsible action. He listed needs for better financial support, better standards for nursing homes, better ways to keep the old in the mainstream of society, better co-ordination of services, and the creation of new norms, all of which would allow greater enrichment, and more concern for the meaning and value of life for all ages. Because he believed that such things as advertising and materialism pervert both youth and age and prevent responsible action for betterment, he felt that a simultaneous change in both cultural and social values was necessary. Such views are utopian and do not take into consideration the reality of political and economic goals and constraints, nor do they consider the extent to which our language, our differing views of progress and of human worth, our social institutions, and the ability to polarize our cognitions place boundaries and varying degrees of freedom on the amounts and kinds of social and cultural change that can occur.

Social scientific studies are beginning to show the importance and the necessity of feedback from the elderly, and in guarding against patronization, helping professions and planning agencies are attempting to develop programs based on the assumption that old people are alert, actively involved in their own concerns, and happy not to have things done "for" them (Keith 1982:69). Allowing the current elderly to make choices will facilitate the aged of the future to make choices. It is not possible to make arbitrary kinds of policies to accommodate the next generation of old people because their wants cannot be predicted and their needs can only be partially anticipated. Future oriented literature often predicts a coming "golden age" for the old based on present emerging values such as a greater tolerance for different kinds of life styles, an increase in social opportunities, the acceptance of a leisure ethic, acceptance of alternate ways to gain pleasure and satisfaction, and better educated elderly. For all the higher education that today's middle aged have been able to acquire, the young are receiving their education in a different social milieu with differing social needs and this could make the education of the future elderly relatively obsolete. Those who were young during the "me" generation of the 1960's have life style and child rearing practices that were non-existent in their parents' youth, yet how this will effect family and friendship relations in the future cannot be foretold. Today's preoccupation with television, video games, and computers will effect the old of the future, and since they are all relatively isolating activities, the effects may be manifest through changed needs for interaction or for involvement in group activities. The processes of human life are seldom repetitive, never identical, poorly anticipated, and not predictable. Social gerontological theorizing represents an attempt to seek for answers to unanswerable questions. Because there are problems in social gerontological theories and research, there are problems with policies. And just as there are many variables to be considered in theoretical and research endeavors, there are, also, in policy formation.

CHAPTER NINE

AN ANTHROPOLOGICAL OVERVIEW OF AGING AND THE AGED

Anthropologists, as have the scholars from the other social scientific fields, have added to the complexity of social gerontology because they, too, have had individualized training. They have brought to their studies of aging their various historical, functionalist, biological, psychological, behavioral, and evolutionist conceptualizations, and their opposing "etic" and "emic" approaches. But because of their participant observation and intensive interview methodologies, their stress on cultural relativity and their holistic approach which demands consideration of all factors, they have been able to show that American social gerontological theories cannot deal effectively with aging as a world wide and human concept. Generalizations, they have found, are not sufficient for the understanding of behavior because each culture is composed of different people who are not a set of specimens.

Anthropological data on aging is accumulating in spite of the fact that there is much more work to be done before cultural comparisons can be conducted and valid conclusions drawn. As have scholars in each of the social science disciplines, anthropologists have repeatedly voiced the need for a basic theory of aging. Fry (1980:20) wrote:

> "Our anthropological investigations of aging are maturing to a point where we can pull scattered studies together. To do this, we need a theory, one that will become a significant part of the anthropological tradition....this should be a theory of age differentiation. We cannot separate older people from younger people and treat them as isolated phenomenon. We must consider age in its totality."

However, because there is so much variation in the ways that cultural phenomena is studies and data is analyzed, it is unreasonable to expect one overriding and universal theory of aging that would be acceptable to all anthropologists.

Anthropologists have been leaders in the field of social gerontology in recognizing that there are differences in aging in simple and complex societies and that aging is a different experience in populations which have a large proportion of older people relative to other age groups (aging populations) than it is in societies in which the proportion of older people in the population is relatively small (Riley 1981:2). Their holistic analyses show the significance of age as a social identity and provide understanding of what is important to old people and to other age groups (Keith 1982:3).

Stress on cultural relativity, holism, and longitudinal research has enabled anthropologists to re-examine their perspectives. They have learned, through time and effort, that anthropology cannot be reduced to psychological or biological concerns, nor can it rely on functionalism for the understanding of social processes.

The anthropological search, as is that of the other social sciences, is for understanding, not judgement. Comparison is the foundation of anthropology, yet there have been few cross-cultural gerontological comparisons made. Most of the existing comparisons are sociological and cross-national in nature. Comparative sociologists concentrate on comparing program development and the social consequenes of aging among the older citizens of the developed nations. Although they acknowledge that there are wide variations in the needs and perceptions of the old in different countries, they believe that similarities can be found among modernized countries because of the historical dimensions of time through which individuals in the same life stage pass, similarities in the kinds of roles they have experienced, similarities in biological aging, and similarities in the number of years that old people have behind and ahead of them (Riley 1981:80). Anthropologists stress the importance of cultural contexts, the range of opportunities and the rules for social interactions within one society, concern for the development of adaptive strategies, and the necessity of looking at all of these factors from an historical perspective (Fry 1981:4). From a cultural point of view, anthropologists have learned that there are different responses to aging among subculture groups, urban and rural dwellers, socioeconomic classes, ethnic groups, and among people of different religious preferences within one culture, and that these must be studied and the differences understood before societies, as a whole, can be compared. Anthropologists believe that in order to find universal aspects of aging and to distinguish them from diverse social responses, a cross-cultural rather than a cross-national approach is necessary (Keith 1982:3).

Cross-cultural data is, as yet, scattered and downright scarce (Fry 1980:14). Society selection has not been done particularily to validate hypotheses and studies that have been done are not often comparable because of the differences in subject matter, methodology, and analyses. Replicable research has not yet been conducted, and, in fact, most anthropological studies of aging have been descriptive rather than theoretical (Glascock & Feinman 1981:15).

Interpretive perspectives are becoming increasingly popular among gerontological anthropologists. Proponents of interpretive theorizing disagree with those anthropologists who attempt to define behavior in terms of social change as in done through modernization and post-modernization theories. The search for meaning as expressed in interaction is a difficult and painstaking search. But interpretive analyses are providing a valuable overview against which all social gerontological generalizations and assumptions can be checked.

An Anthropological View of Aging

Age is a significant and important social characteristic all over the world but nowhere is there a precise age role. Age differentiation has to be understood in relation to all other principles of social organization in any specific culture (Fry 1981:6). In some preliterate societies old age is defined by some external event that is usually imbued with symbolic significance. At the birth of the first grandchild, for example, an individual, whether in the mid - forties or the early sixties, is addressed as old and is expected to assume the rights and responsibilities culturally defined as "right" for that title. Because there are often changes in roles, behaviors, and circumstances with the assuming of the title "old", age is marked in relative terms rather than chronological years. In complex societies, recognition of maturity might be speeded up by early marriage, for example, or slowed down by such circumstances as prolonged schooling or post-retirement age employment, but only in an informal sense. Chronological age serves as a formal and indispensible index in industrialized societies in which institutions are highly bureaucratized and administrative procedures are complex and segmentalized (Neugarten & Hagestad 1979:36), and is the basis for many legal, statistical, and merit purposes throughout life (Keith 1982:27).

The old in any culture are not denied prestige simply on the basis of age. They are judged in terms of their roles and statuses and whether they contribute anything to the society, but the criteria for judgement vary from culture to culture, and from individual to individual, because all over the world, old people are diverse (Fry 1980:4). American social scientists have frequently stated that the importance of age is socially constructed and its meaning depends upon who is making the assessment and for what purpose (see Cottrell 1974:2). Many of them believe that because age is defined in chronological years in a society that is youth oriented, that ranks people in terms of productivity, and that fears death, old age is associated with negative stereotyping and this makes aging difficult (cf. Levin & Levin 1980 and Johnson & Williamson 1980). Generalizations made from this view point are not universal. In many societies, age is important with respect to status because it effects all relationships. Among the !Kung, for instance, age holds status significance even if an individual is older than another by only a few days (Shostak 1983:321). Because so little is known about aging among different ethnic groups, and among peoples of different culture systems, the prevalent American view of aging is not validly applicable to other than some Anglo-American old people.

Time is much more culturally elaborated in complex societies than it is in many simpler societies. Old age is assigned arbitrarily when a person has lived for sixty five years (Clark & Anderson 1960:335), and the idea that knowing one's chronological age provides additional information upon which to base concrete statements is perpetuated. That retirement age can be associated with the onset of dependency and eventual death some theorists see as the basis of ageism (see Matthews 1979:37). Such views are problematic because they tend to legitimize the muddling of biological and psychological processes with the passage of chronological time.

While old age is defined temporally in industrialized societies, it is defined in functional terms in many simple societies. Vigorous old people are seen as less old than are frail and sickly old people. The cultural definition of functionality is infused with the views of family relationships and self-maintenance requirements. Keith (1982:20) explained it this way:

> "Functionality varies from culture to culture because of what one must do to get through the day. If part of being a functional adult is maintenance of an independent household, and part of maintaining an independent household is carrying water from a well a mile away, even a relatively healthy old person might not function adequately. If, however, the usual household organization provides a grandchild to carry the water, the same individual may be "intact" or functional far longer."

Geographical location and the ease or difficulty it might allow for the procurement of life's necessities is an important element in the definition of age in functional terms.

Age is an element in categorization. Categories are ideational but they are considered to be real because humans use them to organize their realities. Categorization is used in all societies to foster and insure group membership which is necessary for the survival of social institutions, but it is imposed on individuals. People are categorized by placement in sequential age grades in many simple societies, and entry is dependent upon certain rites of passage, the completion of certain tasks or the enactment of certain rituals, that legitimize the categorization. The entrants, however, are entitled to participate in all of the social institutions without having to perform further tests of competence, and are limited only by sex and the behavioral expectations for specific age grades. In complex societies in which people participate in a large number of unrelated groups and performance capacities are imperfectly known, chronological age is often the main criterion for entry (Friedmann 1960:120). This can foster age homogeneity within groups and allow only segmented interaction between age groups, so it can make transitions from one age group to the next difficult because it marks the life span with a series of fairly rigid sequences of continuity and discontinuity. Behavior expectations are determined in simple societies on the basis of sex, age, and kinship structures, but in complex societies they are determined in terms of sex, age, class, caste, income status, occuptional categories, ethnicity, race, religion, and family position (Friedmann 1960:22).

Age grades are marked in some cultures by separate "secret societies" and in others by age segregated villages. In many cases an age grade functions as a work unit and in uniting the males of one age category, the possible conflict between lineages is counterbalanced. Age grouping is used to enhance a group orientation rather than a particularistic family orientation in a number of simple societies, acting, therefore, as an integrative institution which fosters alliance formation and facilitates negotiations between generations (Fry 1980:7). In kinship-based societies, older age groups pass the control of production to younger age groups, but in industrialized societies where there is greater social differentiation, adult childrens' life styles can differ significantly from those of their parents, and many areas of social life are organized on principles other than kinship. Nevertheless, anthropologists are suggesting that age categorization might act as a means of reducing conflict among people in various social institutions and of bringing about greater egalitarianism within specific age groups in more complex societies (Keith 1980:196).

All over the world, the life span is marked by a sequential progression of roles and statuses which bring increased responsibilities in the social system followed by an increasing withdrawal from social responsibility (Fry 1980:53), and while both chronological age and social expectations for different age groups are universal phenomena, the cultural dimensions of age can only be found through the analysis of the rules and expectations associated with the sequential life stage statuses. There are fluctuations in the burdens and obligations encountered during different periods of the life cycle, but while those of youth and middle age, before and after career establishment and child-rearing are encountered, are less demanding, the burdens for young - middle age and old people are heaviest. In all cultures, the years of greatest responsibility are tied to the reproductive years during which cooperative effort and productivity are most necessary but, in all, old age is a demanding time for individuals because of the declines in health, income and status which have to be coped with (Fry 1980:54). Because there is only a specific number of years that people can be occupied in child-rearing and productive work, there are similarities in the patterns of age statuses across cultures. Different cultures arrive at different solutions with respect to issues of responsibility and reproduction because people have to adapt to a wide variety of ecological pressures (Fry 1980:60). The life course in industrialized societies is marked by a far greater heterogeneity in choices, constraints, and opportunities than is the life course in simpler societies, but past environmental influences affect the experiences and responses to the immediate environments and this places certain constraints and limits on the range of behavioral adaptations that people in any cultural setting can make in old age (Maddox & Wiley 1976:16). The life span, the social expectations for behavior at different times through the life span, and the occurrance and consequences of historical events are all subjected to the norms and rules of "ideal" culture in all societies, and in each they differ for the societal members with respect to age and sex. They differ, additionally, in complex cultures with respect to socioeconomic status and educational level as well (Fry 1980:56). Nevertheless, the social and cultural meanings of age and the practices of age grouping and status allocation might operate in all societies as mechanisms through which the reduction of conflict, the continuity of social organizations, and the insuring of responsibilities being assumed by those most physically able to do so are handled. Fry pointed out that though sociological life cycle studies are descriptions of expectable status sequences in the institutions of any culture, they are seldom comparable because of the differences in social structures and historical developments. She stated, however, that multidimensional scaling could be usefully applied in the comparison of the variety in responsibilities associated with social identities or age sets at various times in the life cycle (Fry 1980:57).

Anthropologists believe that all over the world, old peoeple are viewed with ambiguity because they are defined through both cultural and social perceptions. Positive and negative themes exist in all cultures to some extent but the balance between them varies in different socio-cultural settings (Amoss 1981:49), and the social gerontological views which might hold for the perceptions of American society can serve only as culturally specific interpretations (Fry 1980:19). When anthropologists compare cultural views of aging and the aged, they look first at the differences among behavior expectations that are related to age norms within one culture. They have found that what might be considered normal in one system might be considered abnormal in another, and what might be appropriate treatment of the old in one culture might be inappropriate in another. When studying the "real" social definitions and the "ideal" cultural definitions of age in one society, a social scientist has to be aware that he brings to his work his own cultural values and definitions about what constitutes normal and abnormal behavior and what comprises the "proper" way to view age and aging.

A Sampling of Anthropological Case Studies

Anthropologists want to do more than merely test hypotheses and theories from other social scientific fields and translate approaches from other disciplines to other groups and other countries (Nydegger 1981:296). As yet, however, anthropology has contributed few purely theoretical ideas to social gerontology. Nevertheless, studies which have been based on the application of borrowed theoretical perspectives in various contexts have shown that many of the time-honored theories in American social gerontology are culture bound and even wrong in light of the cultural data that has been collected (Holmes 1980:279), and that non-industrialized countries in all their variety consistently offer a challenge to such theories (Vatuk 1980:126).

Sociological and social psychological studies of isolation and its relation to health, family interaction. and mental illness using "frequency of contact" as the standard measurement of isolation were conducted during the 1950's. When disengagement theory and Clark and Anderson's anthropological study of aging in California both appeared in 1961, they presented two quite different views, and gerontological scholars were occupied with them until the mid-1970's when isolation studies surfaced again. By that time, however, researchers took more variables into account (Bennett 1980:19), and they found less isolation than the earlier studies had indicated. Voluntary isolates, however, were still thought to be deviant, and their isolation was thought to indicate need. Sociologists and social psychologists with direct input into service agencies influenced social workers to focus much of their efforts toward the provision of support programs for non-institutionalized elderly living in city center, single room occupancy hotels (Lowenthal & Robinson 1976:441). Anthropologists later turned their attention to SRO settings whose residents had been described as total isolates who were completely out of touch with the culture and they were able to show that former studies had not taken into consideration the total interaction networks of the residents and had thereby missed the cultural significance of their social links (Sokalovsky & Cohen 1981:163). Even though about 90% of SRO residents are male, and life long loners who sought non-intimate, utilitarian ties, in-depth study indicated a very low level of extreme isolation among them. Participant observation showed that the perceptions of the value of relationships was such that interactions were highly underrated because they were not reported on questionnaires or in interviews (Sokalovsky & Cohen 1981:169). The residents, it was found, had developed a satisfying informal support network within the hotel. They were suspicious of outsiders and refused to utilize social programs because of fear of possible hospitalization or some other cause that might make them lose their independence (Sokalovsky & Cohen 1981:175).

Bohannan (1981:30) studied poor elderly in three San Diego SRO settings, and he, too, found a fierce independence and a suspicion of social welfare services for the aged. Relationships, he found, tended to be dyadic rather than in the form of organized group activities, and though small informal groups would gather for card playing, for example, they were fluid and unscheduled. Bohannan (1981:34) found evidence of withdrawal that could be traced to physical or psychic catastrophes in childhood, or patterned escape from commitments through life, or a low interest in either success or the work ethic, but the residents varied substantially in their degrees of gregariousness and silence, most interacted with and helped other residents in a non-intensive, but nevertheless present, social network (Bohannan 1981:31).

SRO networks are shallow and transient by choice, and the SRO life style represents an adjustment to aging and the use of coping methods unique to the situations of SRO residents. Sokalovsky and Cohen (1981:183) suggested that social service resource allocation could be more efficient if the findings from network analysis would be taken into consideration.

Vatuk (1980:127) explored disengagement in India, where withdrawal of the elderly is a cultural ideal because late life is seen as a period of rightful dependency in which support from the extended family is expected. Turning control over to the young is an ambivalent event for both generations, however. And though older people verbalize their beliefs in the cultural values, they have difficulty accepting them, and there is evidence of frequent intergenerational conflict although it is muted and psychological rather than overt. Vatuk (1980:128) found that with deep probing in a longitudinal study she was able to show that both modernization theories and disengagement theory were insufficient as means to encompass all of the social and cultural dimensions within one traditional society, and thus, invalid for other areas. Since most studies concerning the status and treatment of the aged do not differentiate between the young-old and the old-old, their generalizations are not directed at only one "population", and it is suspected that support given the old in simple societies is over presented (Glascock & Feinman 1981:27). Vatuk (1980:128) stated that disengagement might be an adaptive strategy of some old, but it is not characteristic of all older people. Anthropologists believe that the overall social position of any age category is an extremely complex issue that cannot be ranked on a single "high" or "low" type of hierarchy. It must be studied with respect to as many distinct social status components as possible, all of which vary along any dimension. Explanations which use synchronic comparisons to draw inferences about diachronic processes are not valid (Vatuk 1980:128).

The Chinese word for "old" when coupled with other syllables creates terms referring to things of value such as "honesty" and "wisdom", a fitting vocabulary feature in a culture that values respect for age, ancestor worship, and several generation households (Black 1973:73). Ikels (1980:80) compared the current realities of old people in industrialized cities and nonindustrialized villages in China. Although they differ in each environment, both differ from the idyllic accounts usually described. Village elderly are relatively secure but intergenerational relations are often strained. Since there is no pension system in China, the old must get support from offspring, lineages, or the village community, and often they must perform demanding duties in return (Ikels 1980:88). In the cities, there are no sanctions for incidents of decreased filial piety, respect, and support. Many old people must do craftwork for business owners in order to eke out an existence. Ikels (1980:96) found that Hong Kong has not provided social support services for the aged as did western European countries at the onset of industrialization, and that there are no special services for the old anywhere in China. She suggested that these facts weakened studies that claimed superior care for the old in agrarian societies the world over.

Kerns (1980:114) studied aging among black Caribs whose culture idealizes filial piety, but both young and old express negative attitudes about aging. People live in small isolated villages, and when the young go out to work, they leave the children and the old in the villages. Security for the old rests on kinship reciprocity and lifelong intergenerational relations. Older people are related to in terms of their personal qualities rather than their chronological years, but childless old widows who remain in their husband's village are subject to ridicule. The parent-child bond is economically and emotionally central in the society and mutual support is of lifelong duration. The quality of support is contingent upon the quality of the relationship over time, and mothers make continual efforts to maintain exchange relationships with their adult children. They offer counsel, comforting, child care, marital advice, medical care and supernatural support in exchange for money, and since families are usually large, mothers play an important role by providing support for unemployed adult children in times of need. Neglect by adult children is handled by complaint and shame as sanction, and it usually works because children are dependent upon their parents, especially their mothers, for help. Kerns (1980:124) noted that survey research reported evidence of the cultural ideals and the reports overrated cultural ideal behavior, but longitudinal research showed that parents have to work continually to enforce the cultural ideals, using aspects of perceived negative perceptions of aging to insure support.

Most American studies of adjustment, and there have been many, have been conducted among the residents of one kind of senior citizen residence or another. Little is really known about the daily lives of the old, however, because about 70% live in their own homes, about 5%

are institutionalized, and the remaining 25% are distributed among apartments, boarding houses, hotels, and other kinds of accommodation. Only about 3% live in senior citizen residences but most adjustment studies have been concentrated on a small portion of that sample (Carp 1976:252). These residences house mainly women, most of whom are relatively poor, healthy, self sufficient, and independent (Hutton 1977:186). Social scientists argued about the merits of age segregated and age heterogeneous living, whether specialized housing fostered sex segregation within age segregation, and whether senior citizen retirement residences and communities were "geriatric ghettos", hedonistic establishments, subcultural, or complexes that legitimized age segregation by masking the downward status of the old (Strieb 1976:72). "Satisfaction" reports were subjective and elicited through survey research, so there was a lot of literature but no satisfactory conclusions to the arguments until several longitudinal studies were conducted. Anthropologists have found that while age segregation tends to reinforce and perpetuate stereotypes, age peers offer relief. Keith (1980:195) wrote that because several studies have been done, we are beginning to understand the mechanisms and conditions that promote solidarity and community development, though we know next to nothing about daily interaction patterns and social networks of the nonsegregated elderly.

Studies in age communities have shown that common age is not sufficient for the formation of community. Most people move to residences for safety and security, but the more the residents are alike in terms of socioeconomic background, marital status, value orientation, sex, and needs for integration and friendship networks, the more possible and probable is the development of a "we" feeling and a group consciousness (Lowenthal & Robinson 1976:440). While social psychologists explain the value of senior housing in terms of opportunities for coping with the environment, obtaining validation of the self, and attaining integrity of life, anthropologists explain the value in terms of peer help and support, enhanced social opportunities, avoidance of lonliness, and less dependence upon family for emotional support which brings about better intergenerational relations (Holmes 1980:282). Evidence for possible community development have been studied from various perspectives such as disengagement, subculture, and stratification theories (see Hochschild 1973);social exchange theory to study reciprocity patterns (see Jonas & Wellin 1980); psychological theories (see Heintz 1976 and Jacobs 1974); and interaction theories (see Teski 1979, Ross 1977, and Jacobs 1975). Studies have concerned the effects of communities on surrounding environments, social service utilization by the old, participation patterns among residents, how deviant members are handled, leadership qualities among the old, and other topics. Jacobs (1974), who studied an affluent community outside a large metropolis, did not find a cohesive community, and stated that the planners erred by forcing withdrawal from familiar surroundings and separation from adult children. In his study of ethnically and racially mixed residents in a high rise apartment building between a university complex and a ghetto, Jacobs (1975) found apathy, evidence of alcoholism, gossip, isolation, poor mental health, and low morale. He stated that interaction patterns have to be related to the settings and the characteristics of the people in them because generalizations are not easily made from one setting to another. Teski (1979) found that the residents in a retirement hotel developed shared meanings along with mechanisms to preserve and defend them against the pressures from outside. Ross (1977) suggested that rather than differing from other age groups in society, the old are merely intent upon developing a cohesive and operating system through which they could preserve the possibility of maintaining their preferred life styles.

Anthropological findings are in agreement with those of other social scientists with respect to the benifits of peer interaction among the old, but anthropological interpretations as to why community spirit develops differ from the interpretations of other social scientists. While sociologists tend to analyze community in terms of development of norms and customs, and social psychologists, in terms of the need to come to terms with the integrity of their lives in association with peers (Rosenfeld 1979:42), anthropologists find that feelings of collectivity arise slowly out of daily interaction which provides patterns that allow mutuality, independence, and the maintenance of self identity. The old negotiate, manipulate rules of conduct, have agreements and conflicts, and develop norms just as others do, but their norms are based on egalitarian values, familial priorities, reciprocity, peer network interactions, emotional support, aid, and rules for coping with sex and death (Keith 1982:115). Anthropologists believe that certain basic human needs and circumstances must be subject to normative regulations in any community, and the old invent norms that enable them to cope with their lives. That their norms differ from those of wider society is not due to old age normlessness, subculture development, disengagement, or conflict with an abandoning society. Rather, the norms of the old are related to their own concerns which differ from the major and immediate concerns of other age groups (Keith 1982:40). Old age norms develop as well because much of the impetus underlying the development of norms in outside society is irrelevant within an old age community. Keith (1982) suggested that communal living among the old in industrialized societies might be very similar in nature to the functional operation of age grading in traditional societies in that it serves to limit conflict to within age groups where it can be more easily handled because of the greater chance of similar perceptions among the residents than might be found between the residents and those of other age groups.

Examination of anthropological case studies readily makes apparent the importance of anthropology to social gerontology and indicates why anthropologists are able to refute the claim of universality made by American gerontological theorists. Anthropological research is detailed and longitudinal and is conducted on small samples. The work is painstaking, and data accumulates slowly. Anthropological findings are relevant to specific times and places because no matter how imperceptible it is, social change is a constantly occurring process. The needs and goals of societies and of individuals change over time and the changes can produce a population which differs from the one that has been studied even though it consists of the same people. Nevertheless, carefully conducted anthropological research and interpretation contributes valuable information that enhances understanding of human nataure. Whether that research is conducted within one simple society, among societies, or in one agency or applied discipline in one small area of a complex society, its findings help to strengthen social gerontological understanding.

CHAPTER TEN

CONCLUSION

Social gerontology, as has been shown, is a broad and complex field of study that is riddled with problems with which social gerontologists must constantly struggle. These problems are rooted in the nature and development of the social sciences in general, and in the dual nature of social gerontology itself. The development of sound and adequate gerontological theory is hampered by political and economic concerns, practical needs that require immediate response, methodological difficulties, lack of clarity in terminology and conceptualizations, and numerous scholarly disagreements concerning the importance of various variables and issues in the study of aging.

The individualized training of social scientists has allowed an atmosphere in which there is great variance in what aspects of aging are deemed important, whether human aging is viewed with optimism or pessimism, and whether greater emphasis should be placed on positivistic empiricism or on philosophical idealism. Scholars in any one of the social scientific disciplines hold conflicting views concerning human needs and human worth that effect the basic premises upon which their research rests. Controversies abound within each discipline but since the social scientific disciplines influence and affect one another, the controversies are compounded in the field of social gerontology.

Terms, concepts, methodologies and interpretations are borrowed and amalgamated across disciplines but with adaptations in keeping with the basic perspectives of each discipline. The stress in sociology is on society as an entity and the evidence of heterogeneity among individuals is minimized. Sociological theories typically ascribe behavior to norms, status positions, social structural needs, various kinds of social stratification, and cultural prescriptions. The stress in psychology is on the individual and there is a tendency to reduce in importance the influence of social and cultural factors on human behavior. Psychological theories ascribe behavior to motives, attitudes, hidden complexes, personality factors, and various other psychological processes. Anthropologists attempt to get an overview of the ways that societies operate in different culture systems and the ways that they effect and are effected by the individuals that comprise them. Anthropologists borrow concepts and theories from sociology, psychology, and social psychology, and test them in their analyses of cultural phenomena, using a wider and more holistic perspective than do the other social scientific disciplines. Anthropologists ascribe behavior to human social interaction. Whereas both sociological and psychological theorists tend to search for causal relationships, anthropological theorists tend to seek meaning. Though there is a certain amount of perspectual rigidity among the social scientific disciplines, each one contributes to the others such that breakthroughs in one field stimulate more complex and sophisticated research and theorizing in the others. Just as the psychological recognition of aging as process affected the ways that studies in all fields were conducted, interpretive anthropologists have influenced theorists from the other disciplines with their "old people are people" perspective which is based on the premise that aging is a life long process and old age is simply one stage of life not unconnected from the other life stages.

The problems inherent in the dual nature of social gerontology are coupled with those occasioned by individualized training and disciplinary differences. There is conflict between seeking scientific knowledge and seeking practical solutions to everyday problems. And the trend to seek scientific knowledge is torn between placing ever-greater stress on objective empiricism and on the subjective search for individual and shared meanings. Because applied disciplines and social welfare agencies demand information for policy formation, the pressure to concentrate on narrow, non-academic, non-empirical, practical and immediate concerns is quite pronounced.

Social gerontology is most well-developed in the United States. The tendency for other countries to rely on American research findings, to adopt American assumptions, and to copy American programs is strong. This tendency is problematic in light of the fact that American social gerontological studies have been limited to a small sample of older people, namely, to a small portion of older, middle-class Anglo-Americans. Anthropological studies have shown that aging as experienced by Anglo-Americans is not a universal experience.

The social sciences evolved from philosophical views about the ways that society is organized and operates. From the view of those who believe that reality exists only in observable phenomena comes the trend toward seeking objectivity and scientific validity in the study of human life. Positivistic empiricism represents a method of studying social processes without reference to individuals or to meaning. Philosophical idealism is based on the belief that reality exists only in humnan experience and in the ways that humans perceive their experiences. And though idealists criticize the empirical stress on operational procedures, while positivists find philosophy vague, speculative, and unscientific, the social sciences arose from a background based on these unresolved and opposing points of view.

The earliest sociological theories were functionalist role theories. Accused of being mechanistic, static, and unable to deal with change, they were subjected to a progression of adjustments that rendered them increasingly more terminologically and conceptually unclear and made them cumbersome and complex. Psychological theories were developed from medical studies conducted on limited samples and from the untestable, speculative ideas that issued from psychoanalysis. Interpretive theories, most closely aligned with philosophical idealism, defined social behavior as arising through negotiation which determined shared meanings and social rules. Theorists could point to the flaws in reasoning upon which opposing theories were built but they could no more disprove them than they could prove the correctness of their own theories. Societies do exist and they do persist. Individuals do learn behaviors that typify certain roles and positions. There are psychological processes that are typical of people in various stages of the life cycle. Yet each society, each role, and each position is definable in terms of its individualized uniqueness. People do develop through social interaction, yet they remain individuals, definable in terms of the uniqueness of their personalities and their being. Each kind of theory accounts for some aspect of human life, but all generalizations are too narrow and confining, and too limited in scope and understanding to adequately define human behavior. The controversy fostered by opposing view points slows the progress of theoretical development but it forces the re-examination of firmly held beliefs and opinions, and it serves to stimulate new thinking. Each newly-developed, tentative theory is difficult to refute or to confirm. Research replication is very limited and what does exist offers alternative interpretations which only serves to multiply controversy.

The need for solutions for the social problems of older people preceeded the development of social gerontology as a social science. Because the earliest studies of old people were medical and biological, and because sociologists were the first among social scientists to study the well-elderly, the earliest social gerontological studies were functionalist role theories patterned on a biological analogy. Sociological research was dominated by a normative approach while psychological research was conducted with reference to mental health factors and their relationship to successful adjustment to aging. The theories that resulted from these early research projects fostered both ageism and sexism. The old were defined in terms of role loss, disengagement, poor adjustment, and psychological rigidity. Criticism of the different kinds of theories abounded but since it was not based on replicative research, and frequently on invalid reasoning, it was, itself, invalid. When interpretive theories were applied to the study of aging, they, too, were criticized as being speculative and untestable. In an attempt to break the deadlock occasioned by such controversy, theorists began to suggest new ways to view the processes of aging. Social exchange theories were employed by both sociologists and psychologists. More recently, complex ecological and environmental theories have been developed to study the ways people adjust to growing older. Sociologists used cross-sectional comparative and cohort analysis techniques while anthropologists began to concentrate on network analysis. Criticism of the most recently applied methodologies and the most recently developed theories is, as yet, limited because their usage has been too recent to enable assessment of their impact.

Modernization theories were developed by anthropologists and the earliest of these tended to portray aging as a negative experience. A number of them were based on romanticization of the life styles deemed to be typical of pre-industrial, agrarian societies. In a similar manner, post-modernization theories tend to be either pessimistic or overly optimistic and utopian. While some theorists suggest that aging will become easier as a result of changes occurring in American social values, others suggest that competition for scarce resources could create greater ageism and sexism in the future. Both social psychologists and interpretive anthropologists have begun to study aging in terms of developmental theories, and anthropologists are attempting to ascertain the consequences of aging in light of the existence of both "ideal" cultural and "real" social definitions of age.

Over the years, social scientists have advanced their knowledge about aging through the realization that earlier theories suffered from the use of too few variables, the overuse of ill-defined concepts, the stress on chronological age as an important social marker, and the tendency to analyze social and biological phenomena from a functionalist perspective. Later studies have shown earlier theories to be too simplistic. As various new methods of study have been attempted in an effort to attain greater objectivity, they have given rise to theories whose flaws are pointed out by interpretive theorists who oppose "scientism". No matter what method of study is employed, be it survey, intensive interview, longitudinal, cross-sectional, or comparative research and investigation, there are inherent problems. It is impossible for anyone, layman and social scientist alike, to be totally objective about his own life time, his own behavior, his own society, and his own culture. The social sciences cannot be free of subjectivity because human behavior cannot be fully comprehended or explained without reference to philosophical reasoning and abstract, untestable conceptualizations (Back 1976:414).

Social gerontological theories consist of social criticism, impressionistic observations, speculative ideas, and empirically derived "facts" in various combination, and as such, they are subjective, tentative, and inconclusive. The social scientific search for laws governing human behavior is translated, in social gerontology, into a search for a group of integrated principles which would provide an overriding theory about the processes of aging and the state of being old. But the possibility of developing an organized ideological orientation in social gerontology seems to become more and more remote as theorists become increasingly aware of both the simplistic nature of their theories and the great complexity and variability of human behavior. It is small wonder that there is no overriding theory of aging. Even if distinct trends and patterns of behavior were found, the generalizations that would issue because of their existence would not stand for long. Dubos (1981:6) illustrated this by writing:

> "Persons and societies do not submit passively to surroundings and events. They make choices as to the places where they live and the activities in which they engage - choices based on what they want to be, to do, and to become. Furthermore, persons and societies often change their goals and their ways; they can even retrace their steps and start in a new direction if they believe they are on the wrong course. Thus, whereas animal life is prisoner of biological evolution which is essentially irreversible, human life has the wonderful freedom of social evolution which is rapidly reversible and creative. Wherever human beings are concerned, trend is not destiny."

Just as there are theoretical and methodological problems in social gerontology, there are problems unique to research endeavors in the field. Since much of the current research is guided by reliance on existing theories there is a pronounced tendency to accept findings from related fields. Sociologists, social psychologists and anthropologists are all prone to accept without question, data from the statistical sciences. Their research is colored by unqualified acceptance of the findings from the fields of demography, economics and political science. Research investigations are impinged upon by the concerns of helping agencies, applied disciplines, and funding institutions. Because there are more career opportunities for social scientists in applied disciplines rather than in academic spheres, investigators are faced with having limited control over the conditions of their research. The possibilities of losing one's perspective and of finding what is looked for are enhanced. And there is little reason to conduct replication of research which is carried out in order to find solutions to specific social problems. The tendency to ignore heterogeneity among older people is fostered by reliance on limited, and often self-selected, samples. Cross-sectional comparisons are frequently cited, but since they exaggerate the homogeneity of behaviors within age groups, they are of limited explanatory value. The tendencies to find homogeneity and to under-emphasize diversity are compelling because they facilitate generalization but they are tendencies that have constantly to be checked if the goal of social scientific research is true understanding.

Policy formation relies on research findings. But because there are numerous theoretical, terminological, conceptual, and methodological difficulties that affect all areas of research, gerontological policies are far from perfect. The implementation of policy is directly affected by political and economic concerns. Most frequently, policies reflect short-range goals. There are few long-range goal policies in effect, and at any rate, they have a high probability of being ineffective over the long term because it is simply impossible to be certain about future trends and future needs. Once policies are implemented they are difficult to change. Policy evaluation is unreliable because there is always an element of self-interest that colors the dealings in and among agencies. Policies and programs can, and do, outlive their usefulness, often because they are based on inadequate knowledge and faulty assumptions. Sometimes, too, needed programs have to be dropped because of lack of sufficient funds. Program policies and funding decisions are made by different agencies and by differing levels of government which have litle control over their actual implementation at the local level. Furthermore, there is a definite lack of co-ordination of programs and services for senior citizens. While there is both redundancy and overlap of some required services and programs, there is an under abundance of others in all regions of the country because so many different agencies and associations are involved in providing programs and services for older people.

The Future of Social Gerontology

All social scientists know that social systems constantly undergo change and that much of the change is due to conflict rather than consensual agreement. Anthropologists have pointed out the significance of age, universally, and are now suggesting that age categorization might serve as a societal coping mechanism whereby conflict is most effectively handled. Such interpretations provide new food for thought and suggest that social gerontological knowledge will be enhanced by a more widespread and consistent application of anthropological methodologies and of interpretive perspectives. Individuals cannot be separated from their meanings if they are to be studied holistically, and it is only through seeking meanings that social scientists can hope to fully understand human behavior and the patterns of interaction that give rise to it. Marshall (1980:62) an interpretive sociologist, stated that the differences between the sexes with respect to income levels, ethnicity, ways of experiencing aging, family roles, perceptions of health and usefulness, personality factors, and issues having to do with self concept make general patterns of aging hard to find. But Teski (1979:168), in her anthropological account of life among the residents of a retirement hotel, stated that social scientists should be able to discover patterns of behavior that are typical of older people by watching them solve their problems, engage in meaningful interaction, express their reactions to aging, and work through their value orientations within the confines of their ethnic and sex differences.

Social scientists have to look at all relevant factors when they study aging. One aspect of the American cultural ideology that makes this very difficult is the attempt to play down the significance of social class and to view the country as a melting pot in which social, economic, occupational, and educational equality is fostered. Class distinctions color a great deal of the social interactions that take place and that are possible (Kaplan 1960:432). Countries which see themselves as having an open class system do not study class conflict well. Because social scientists attempt objectivity, wish to avoid biases as far as possible, and want to present reports that are as value free as possible, they tend to avoid in-depth discussions of social class. Nevertheless, they have a tendency to identify the middle and upper classes as best in some vague, undefined way. The social institutions reflect middle class values and life styles, and by virtue of his training and his own life style, a social scientist has middle class biases and beliefs that make it difficult for him to "read" the lower classes properly (Havighurst 1971:121). Because each social class has its own socialization practices, language usage, ideology, aspirations, hopes, fears, interaction patterns, peers, and definitions of life, class is probably more important in determining different kinds of adaptations to aging than are the usually identified determinants such as social relationships, personality factors, ethnicity, race, religion, birth order, family size, and occupational differences (Havighurst 1971:115).

Almost as little is known about ethnic membership and its relationship to aging as is known about the significance of class differences with respect to growing older. Little progress in gerontological understanding can be made, however, without adequate knowledge of ethnicity. In order to make valid statements about ethnic groups, their historical experiences, their degrees of solidarity and cohesiveness, and their value systems have to be known (Fry 1980:8). It is not known whether there exists a variety of perceptions about aging, about time, and about the meanings of historical and social events across class and subgroup strata within one ethnic population (Bengtson 1979:24). Knowledge is lacking, too, about the ways ethnic group members perceive and are influenced by the values of the dominant culture. The relative importance of ethnicity as an explanatory variable will remain controversial until the historical roots, immigration or conquering patterns, and the history of the ethnic group's American experience are studied (Gelfand 1982:13).

Anthropologists have shown the importance of cultural relativity in situations in which American policies have been introduced in other countries. In their studies of ethnic groups in North America, anthropologists can contribute valuable information to practitioners and policy makers and can stimulate recognition of the fact that social policies designed to meet the needs of middle-class Anglo-Americans cannot be assumed to serve the needs and desires of all of America's older people (Bengtson 1979:12). There can be no doubt that cultural concerns will have greater importance in future studies of aging and in both policy formation and the development of programs and services for older people. Anthropological studies have shown that the need for cultural sensitivity is equal in importance to the needs for political and economic sensitivity.

Anthropology as a discipline has helped to emphasize the fact that aging is a multidimensional process with a distinct interrelationship of biological, psychological, behavioral, social, and cultural sub-processes. Moreover, aging is a context-specific process varying among individuals, groups, and societies. No single theory can be adequate to describe aging itself, to analyze the problems associated with old age, or to provide a useful guide to social action. Thus, the issue of whether or not social gerontology constitutes a useful social scientific discipline, or indeed, can be regarded as a distinct discipline at all, is raised. If this position is advocated, then it is suggested that specific issues concerning the aging processes come under the scrutiny of those social scientific disciplines best prepared to handle them.

Alternatively, it is suggested that social gerontology could be transformed into a more productive discipline by a focus on specific problems raised by the recognition of adaptations which follow the onset of individual biological and cognitive maturational decline. These processes, although common to all human beings are handled differently according to differences in culturtal systems and in individual traits and propensities. A renewed interest in the social and cultural dimensions which affect such declines may produce terminological and conceptual clarity and, thereby, stimulate new directions of research in an area of concern which has both academic and practical significance.

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